Virtual SYSCOM / NAVSEA SeaPort

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Document Status

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Document History

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0.1	1/23/2004	Aquilent	Initial draft.
1.0	4/9/2004	Aquilent	Baseline SeaPort-e materials.
1.1	4/22/2004	Aquilent	Modifications based on input from initial training sessions.
1.2	8/21/2004	Aquilent	Modifications based on Phase II functional changes. Updated Bid Event Creation section based on system changes.
1.5	10/25/2004	Aquilent	Updated Bid Event Creation section based on system changes.
1.6	2/1/2005	Aquilent	Updated document to current system through 1/29/2005 deployment. Primary sections affected: 1.4.2 Header Navigation 1.4.3 Left Navigation 1.7 Roles and Permissions 2.2.1 Create Purchase Request using Wizard 2.2.10 Small Business Set Aside 3.2.9 Review Questions & Answers 3.2.10 Small Business Set Aside 3.2.11 Lock and Release Solicitation 3.2.12 Solicitation Amendment Process 3.2.14 Award Determination 3.2.14.5.5 Goals (Subcontracting) 3.2.15.5.6 Subcontracting Plan 3.2.15.9 Understanding the Select Winner Tab 4.2.2 Add Administrative Data 4.2.3 Add Pricing Structure Data 4.2.3.3.2 Negotiation 4.2.3.4 TO Funding 4.2.7 Add DD350 Data 4.2.9 Execute Task Order 4.2.11 Set Aside 5 Reports
1.7	7/8/2005	Aquilent	Updated document to reflect current system through 7/6/2005
1.8	10/31/2005	Aquilent	Updated document to reflect current system through Release 35

			(10/31/2005). Please see "SeaPortII Training Session Updates R35.pdf" for specific Release Notes/details.

Table of Contents

Table of Tables

Table of Figures

AQUILENT

1   System Overview

This section details the System Overview training session. The System Overview training session follows the structure outlined in the *SeaPort II Training Plan*, Section 3.1: Training Methodology, and contains the key concepts outlined in Section 5: Training Curriculum.

1.1   History of SeaPort

The SeaPort e-procurement portal provides a secure automated procurement process that improves processing time, provides the ability to take advantage of numerous acquisition reform initiatives, including award term contracting and electronic signatures, while still allowing Program Managers (PM) the ability to select solutions that meet their Professional Support Services (PSS) requirements. At the core of this portal is the fundamental concept that any PM can use the portal with minimal training in an intuitive "amazon.com"-like environment.

The private SeaPort e-marketplace provides end-to-end government to contractor support for the acquisition of PSS from the definition of requirements to contract closeout in a completely paperless and secure environment. The portal is web-based allowing requirements to be defined and proposals to be solicited, submitted, and evaluated from any location. Legally binding digital signatures, which have been defined by the electronic processes, are used to execute task orders. Modifications to task orders are generated in SeaPort by re-using the data captured from the current version of task orders, improving both the processing time and accuracy of modifications. Finally, solicitations, task orders and other contract documents are captured in an electronic resource library to provide models for future procurements. This move from segregated paper processes, to fully integrated electronic processes, dramatically reduces the time and cost associated with the acquisition of support services. PSS service acquisitions, which used to take months, now take days. To facilitate continuous improvement, the e-procurement portal captures data on each step of the process providing current performance metrics.

1.2   Procurement Process

SeaPort procurement consists of the following basic steps:

Step 1 .   A SeaPort User creates a draft Purchase Request (PR) either by use of the New PR Wizard or by cloning an existing SeaPort document.

Step 2 .   The draft PR is routed to a PCO or 1102.

Step 3 .   Once the PCO/1102 is satisfied that the PR is complete, they create a draft Solicitation Document (SD).

Step 4 .   Once the draft SD is fully populated and complete, a PCO Locks & Releases the official Solicitation, and creates a Bid Event for MAC Contractors. If necessary, SD Amendments can be generated after the solicitation has been released.

Step 5 .   When the Bid Event closes, all bid information is passed back to BuySite.

Step 6 .   The PCO/1102 starts the evaluation process.

Step 7 .   When the evaluation process is completed and a winner has been selected, the PCO creates a draft Task Order (TO).

Step 8 . Once the draft TO has been fully populated, completed, and the PCO is satisfied, the PCO executes the TO.

Step 9 . If necessary, TO Modifications can be generated after the TO has been executed.

Figure 1 below illustrates the procurement process.

Figure 1 : Procurement Process Diagram
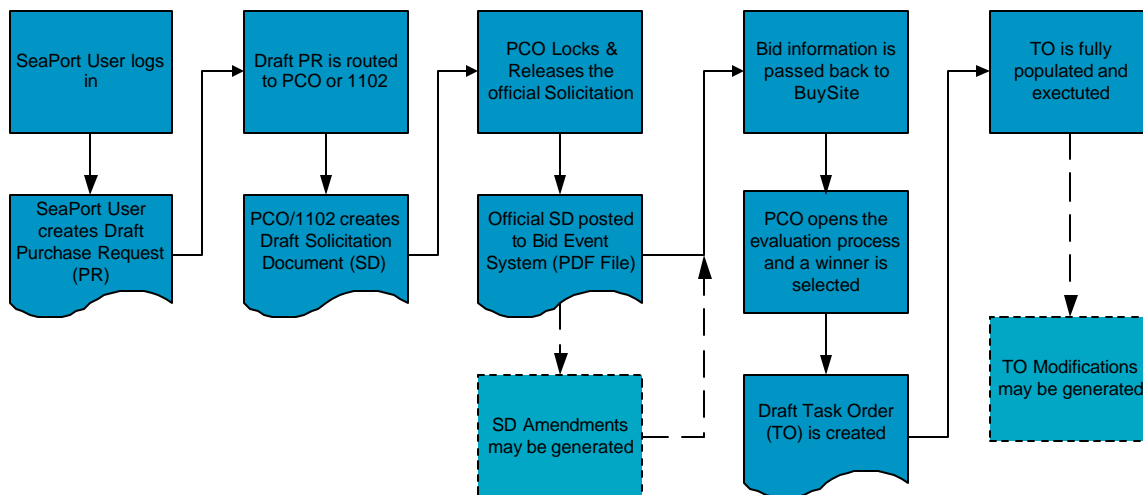
1.2.1   SeaPort Benefits

Two-thirds of the cost in awarding a task order are in sourcing, drafting, and forwarding the requisition; obtaining approvals; and placing the order. Another third is incurred in generating payment, data reconciliation and integration, and contract closeout. Other process costs are incurred in monitoring contract performance for the life of the task order.

SeaPort reduces these general and administrative expenses through process automation, supplier consolidation, services aggregation, and standardized negotiation– consistent with federal and defense acquisition laws and regulations.

1.3   Access to the system

Access to SeaPort is requires a user login. The SeaPort User administrator can create user accounts that will allow access to the system.

1.3.1   Get a SeaPort Account

To get a SeaPort account, follow these procedures:

Step 1 . Go to the SeaPort home page at http://www.seaport.navy.mil/index.html

Step 2 . Click on the Buy tab.

Step 3 . Click on the *Register Now* button.

Step 4 . Complete the on-line registration form.

Pay particular attention that your registration information is accurate and complete. This is especially true of your e-mail address and your defined role. Avoid the use of rank or other designations in the Name field. The Name field is used to generate the Login that you will use to log into SeaPort. The use of rank or other titles will make the Login longer, more complicated, and harder to remember.

Step 5 . Click the *Submit* button. This will submit your request to the SeaPort User Administrator for review and approval. Each field activity will have a local User Administrator. You will receive e-mail notification after the SeaPort User Administrator has either approved or rejected your request.

Step 6 . Within 24 hours you will receive a response from the SeaPort User Administrator. If you have not received a response after 24 hours, contact navseasupport@aquilent.com for assistance.

1.3.2 Access the System

To access SeaPort, follow these steps:

Step 1 . Access the SeaPort Web site at URL: http://www.seaport.navy.mil/

Step 2 . Click on the Buy tab.

Step 3 . Click on the Access Portal link in the header navigation. This will take you to the SeaPort eProcurement Login page.

Step 4 . Log in to the SeaPort eProcurement portal.

Figure 2 : SeaPort Login

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1.4 Navigation within the system

Once you have logged into the system, you will see the user home page. From this page, you can access the Document Library, or the Workflow page, as well as the header navigation.

1.4.1 Control Types

The following control types are used throughout the SeaPort interface. These types of controls should be familiar to anyone who has used a World Wide Web browser in the past.

✍ Radio	✍ Check Boxes	✍ Links
✍ Dropdown	✍ Buttons	✍ VCR Controls
✍ Text Box	✍ Icons	

1.4.2   Header Navigation

The Header navigation is consistent throughout SeaPort. It contains the following navigational elements. Note: Not all elements are available to all users.

Table 1: Header Navigation

Navigational Element	Description
Document Library (icon)	Displays the Document Library (The Helm). The purpose of the Document Library is to search/edit/view a NAVSEA Purchase Request, Solicitation Document, or Task Order.
Help	Opens a context-sensitive Help window.
Log Off	Logs the user out of SeaPort and displays the login page.
New Purchase Request	Starts the Purchase Request Wizard.
Document Library (link)	Displays the Document Library (The Helm). The purpose of the Document Library is to search/edit/view a NAVSEA Purchase Request, Solicitation Document, or Task Order.
Workflow Page	The Workflow page presents packages according to their state in the procurement workflow. These states include: Active Documents, Things to Do, etc. The Workflow page does not contain search or filtering capabilities.
Bid Event Login	Logs you in to the Bid Event section of SeaPort. From here you can view details of existing bid events, create a new bid event, or view notification messages. **Note:** Bid Events will open in a separate window.
Helpdesk Login	Logs you into the SeaPort helpdesk utility, where you can enter a helpdesk ticket (problems, suggestions, etc.). Tickets are automatically routed to the SeaPort support team.
Reports	Displays the SeaPort Reports page. The SeaPort Reports page allows the user to choose a report from a list of all SeaPort reports. **Note:** Not all users have access to the same reports.
ConOps	Displays the Seaport project Concept of Operations, as well as various sample exhibits.
System Administration	Displays the System Admin page. The System Admin page allows the user to choose from a list of SeaPort administrative functions.
My Profile	Displays the User Profile page. The User Profile page allows the user to change user information that is stored in SeaPort. This is where a user changes his login password.

New Purchase Request	Document Library	Workflow Page	Bid Event Login	Helpdesk Login	Reports	ConOps	System Admin	My Profile

Figure 3: Header Navigation

1.4.3   Left Navigation

The left navigation is dynamic and will change as you progress through the procurement process. Below is an example of how the left navigation changes as the package status changes from Draft Purchase Request to Executed Task Order.

Table 2: Left Navigation: Package Home

Navigational Element	Description
Package Home	Takes the user to the package home page shown in Figure 45: Package Home.
History	Displays the Date, Event, Notes, and Agent of the package. The History page is displayed in Figure 6.
1102 Files	Files that may be important or are related to the package may be stored here. This area is restricted to only 1102 users; therefore it may be advantageous to place certain files here instead of attaching them to a PR, SD, or TO. The 1102 Files page is displayed in Figure 7.
TO Cost Reduction	The TO Cost Reduction panel provides users with information on the Saving Method and the Total Savings. The TO Cost Reduction page is displayed in Figure 8.
Package Admin	Allows changes to the package's Short Description, Surcharge Rate, and Organization. The Package Admin page is displayed in Figure 9.

Table 3: Left Navigation: Purchase Request

Navigational Element	Description
Administrative	Accesses the PR Administrative information as shown in Figure 47.
Pricing Structure	Accesses the PR Pricing Structure information as shown in Figure 48.
Requirements	Accesses the PR Requirements information as shown in Figure 62.
Procurement	Accesses the PR Procurement information as shown in Figure 65.
Attachments	Accesses the PR Attachments information as shown in Figure 67.
Evaluation Team	Accesses the PR Evaluation Team information as shown in Figure 69.
Criteria	Accesses the PR Criteria information as shown in Figure 70.
Advanced Planning	Accesses the PR Advanced Planning matrix as shown in Figure 71.

Table 4: Left Navigation: Solicitation Document

Navigational Element	Description
Administrative	Accesses the SD Administrative information as shown in Figure 73.
Pricing Structure	Accesses the SD Pricing Structure information as shown in Figure 74.
Requirements	Accesses the SD Requirements information as shown in Figure 82.
Procurement	Accesses the SD Procurement information as shown in Figure 85.

Navigational Element	Description
Attachments	Accesses the SD Attachments information as shown in Figure 86.
Evaluation Team	Accesses the SD Evaluation Team information as shown in Figure 88.
Advisors	Accesses the SD Advisors information as shown in Figure 89.
Criteria	Accesses the SD Criteria information as shown in Figure 90.
Q & A	Accesses the SD Q & A information as shown in Figure 92.
Advanced Planning	Accesses the SD Advanced Planning information as shown in Figure 91.

Table 5: Left Navigation: Task Order

Navigational Element	Description
Administrative	Accesses the TO Administrative information as shown in Figure 155.
Pricing Structure	Accesses the TO Pricing Structure information as shown in Figure 156.
Requirements	Accesses the TO Requirements information as shown in Figure 168.
Attachments	Accesses the TO Attachments information as shown in Figure 171.
Advisors	Accesses the TO Advisors information as shown in Figure 173.
DD350	Accesses the TO DD350 information as shown in Figure 174.
Performance Based	Accesses the TO Performance Based information as shown in Figure 175.

Package Home   **Purchase Request**   **Solicitation Document**   **Task Order**
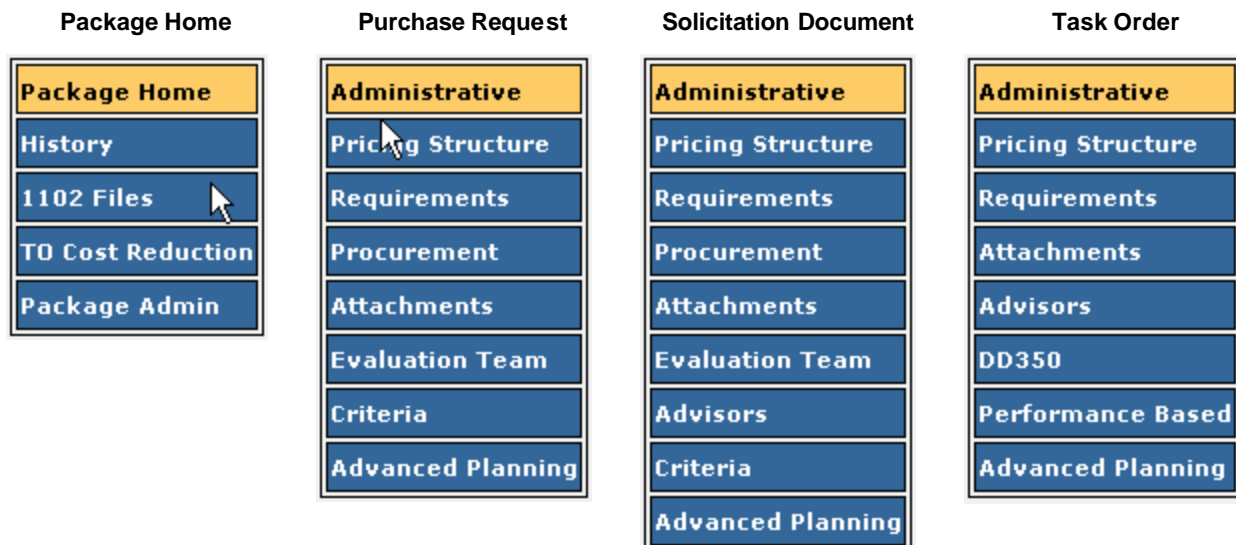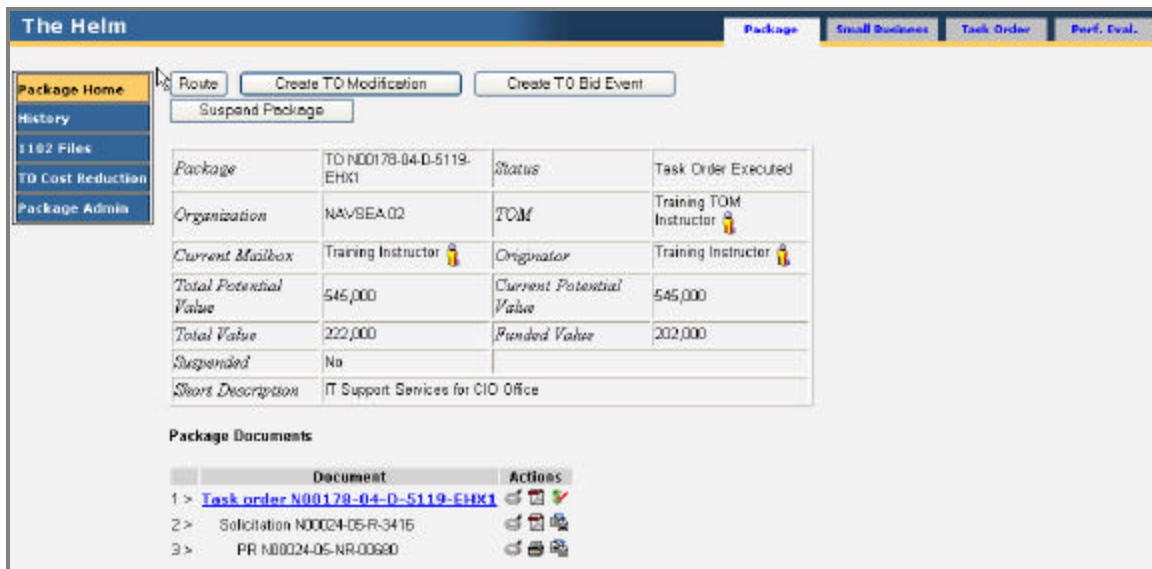
Figure 4: Left Navigation

A package can be selected from the SeaPort Document Library or from the Workflow pages. The Package's left navigation panels are shown in the following images; this includes the

Package Home, History, 1102 Files and Package Admin pages. The Package Home page is displayed in Figure 5 below.

Figure 5: Package Home

The SeaPort system provides 1102 and PCO users the package admin panel for viewing the Package Action History and the Timeline. This information is read-only. The History page is displayed in Figure 6 below.

Figure 6: Package History

The SeaPort system provides 1102 and PCO users a file storage area that is independent of the general files attachment area. The 1102 Files area is not available or visible by any other user. The 1102 Files Area is accessed from the Package tab as shown in Figure 7 below.

Figure 7: Package 1102 Files

The TO Cost Reduction panel provides users with information on the Saving Method and the Total Savings. This panel is available after a Task Order has been executed.
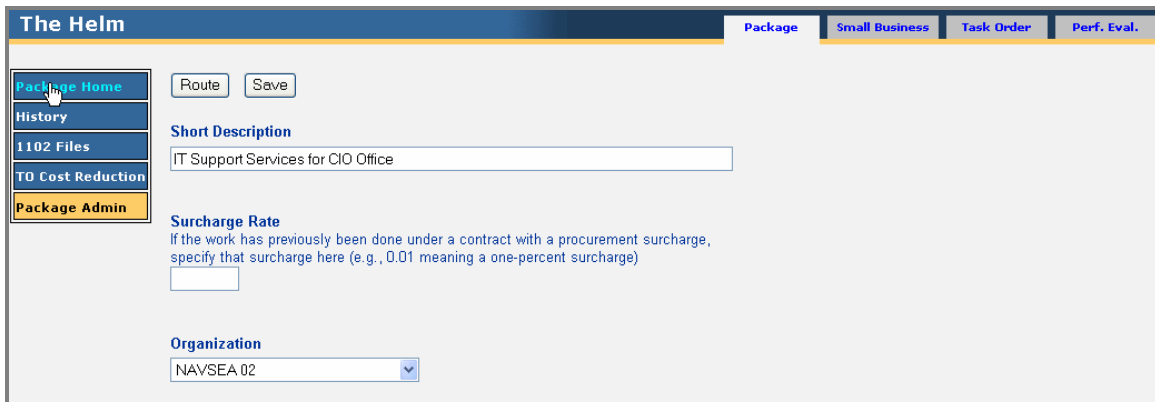
Figure 8 : TO Cost Reduction

The SeaPort system provides 1102 and PCO users the package admin panel for updating the Short Description of Work and, if applicable, the surcharge rate for saving calculation purposes.   The Package Admin Panel is accessed from the Package tab as shown in Figure 9 below. Both the Short Description and Surcharge Rate fields can be edited by the user. Once any changes are complete the user simply needs to press the *Save* button.

The *Route* button is provided to allow the user to forward the package to another system user for review.

Figure 9: Package Admin

1.5 Using the Document Library

The document library contains packages. A package is a collection of related procurement documents. The contents of a package are added to over the procurement lifecycle of that package, and will contain a purchase request, solicitation documents (and amendments), and task orders (and modifications).

Figure 10: Document Library

By default all packages in the user's mailbox are listed under the My View tab. The user's mailbox contains all packages that have been created by that user but not yet routed to anyone in addition to any packages that have been routed to that user by another user. This list may be filtered in various ways by using the fields at the top of the page, as well as those found within the Advanced View tab described below. Select your filter criteria and click the

Go button to apply the filter to the list. Click the *Show All* button to remove the filter and have all items listed.
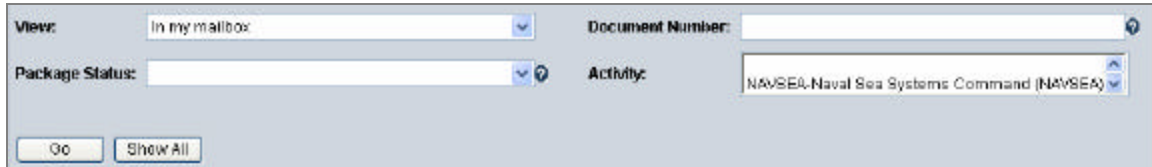
Figure 11: Document Library – Default Filters

Packages in the list can be sorted by any column in the header. Use the up arrow to sort in ascending order or the down arrow to sort in descending order.

The standard column headers are displayed in Figure 12 below. They include Package, Package Status, Solicitation, Activity/Organization, Mailbox, Originator, and MAC.

Figure 12: Document Library – Default Column Header

The Document Library also offers an Advanced View tab, with a fully expanded set of filtering capabilities and columns.
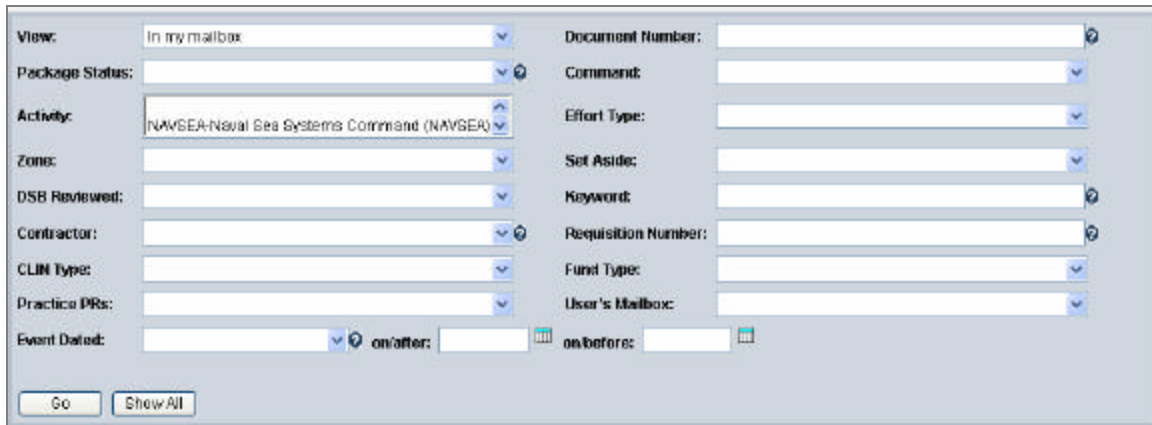
Figure 13: Document Library – Advanced View Filters
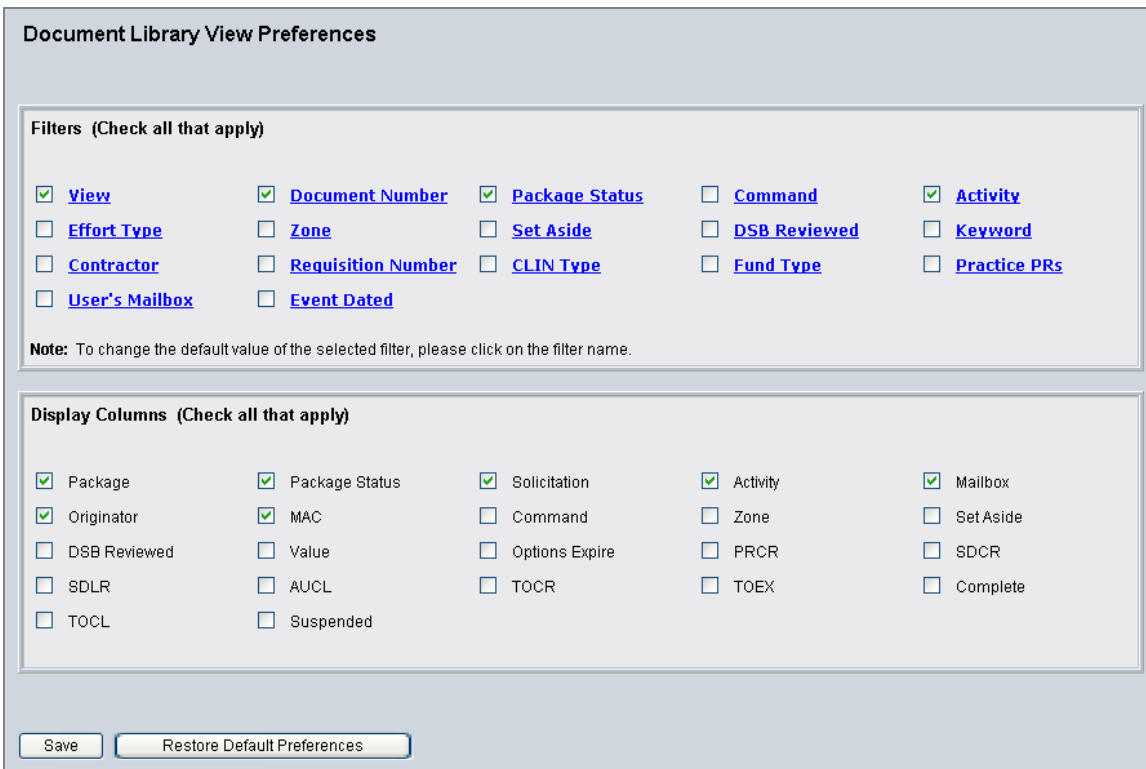
The Advanced View column headers are displayed in Figure 14 below.   They include Package, Package Status, Solicitation, Activity, Mailbox, Originator, MAC, Command, Zone, Set Aside, DSB Reviewed, Value, Options Expire, PRCR, SDCR, SDLR, AUCL, TOCR, TOEX, Complete, TOCL, and Suspended.

Figure 14: Document Library – Advanced View Column Header

The Preferences tab allows the user to control the set of default filters and column headers shown on the My View tab. Each filter and column header is listed along with a checkbox.

The user may check off the settings they would like applied to their default My View page and then choose the Save button.

Figure 15: Document Library – Preferences

There is also an option to restore the default preferences available to the user.

In addition to selecting the default filters that are listed on the Document Library's My View tab, the user can also specify the default filtering value by clicking on the individual filter's name. **Note:** Values entered here will be included in the My View filtering process regardless of whether they are checked off for display on the My View page.

Figure 16: Document Library – Preferences Default Filter Value

Available filters are listed in Table 6 below.

Table 6: Document Library Filters

Field	Type	Description
View	Dropdown	Displays only those packages that are part of the selected View. Choose from: In my mailbox, I originated, I need to evaluate, I evaluated, I manage, Ever in my inbox, or Options Expiring.
Effort Type	Dropdown	Displays only those packages of the selected Effort Type. Choose Seaport or SeaPort Enhanced from the dropdown.
Contractor	Dropdown	Displays only those packages where the Task Order was awarded to the selected Contractor. Choose a Contractor from the dropdown list.
User's Mailbox	Dropdown	Displays only those packages in a selected user's mailbox.
Document No.	Text Box	Displays only those packages where the document number entered is contained in the package number. The following formats are acceptable (In the examples below, "A" represents any letter, "0", "1", and "2" represent any numbers): **PR:** A00000-00-AA-00000 **SD:** A00000-00-A-0000 1111 (where 1111 is an optional amendment number) **TO:** A00000-00-A-0000-111122 (where A00000-00-A-0000 is a MAC number, 1111 is a TO number, 22 is an optional mod number) If the exact number is unknown, the partial search can be performed using "%" (or an asterisk) before or after the known part. For example, search for "%111122" will return all the Task Orders with the number ending with 111122.
Zone	Dropdown	Displays only those packages in the selected zone.
Requisition Number	Text Box	Displays only those packages containing the Requisition Number entered. Search by Requisition Number. This search may include wildcards.
Event Dated	Dropdown & Text Box	Displays only those packages where the selected Event has occurred between the dates entered. The Date On/After and On/Before filters are related to the Event filter. Enter a date range. Either type in a date or use the calendar icons to select a date. The format MM/DD/YYYY needs to be used for date entries.

Field	Type	Description
Package Status	Dropdown	Displays only those packages with the selected Package Status. Choose from: PR Draft, Solicitation Draft, Solicitation Released, Bid Evaluation, Solicitation Amendment Draft, Task Order Draft, Task Order Executed, Task Order Executed, with Mod in Draft, Task Order Complete, or Task Order Closed.
Set Aside	Dropdown	Displays only those packages with the selected Set Aside designation.
CLIN Type	Dropdown	Displays only those packages of the selected CLIN Type. Choose from: Cost Type, FFP, or ODC (Cost Only).
Command	Dropdown	Displays only those packages under the selected Command.
DSB Reviewed	Dropdown	Displays only those packages that have or have not yet been reviewed by the DSB.
Fund Type	Dropdown	Displays only those packages of the selected Fund Type. Choose from: FMS, OPN, O&MN-N, O&MN-R, PANMC, RDT&E, SCN, WPN, OTHER, TBD, MDA, NDSF, or PMC.
Activity	Dropdown	Displays only those packages of the selected Activity or Organization. Choose an Activity or Organization from the dropdown list.

Field	Type	Description
Keyword	Text Box	Displays only those packages where the keyword entered is contained in the Statement of Work or other long fields. Put in a word (or a more ambitious search expression) to seek in paragraph-or-longer fields of the Purchase Request, Solicitation Document and Task Order. Here are examples of things you can search for. ✍ `warfare` ✍ `"undersea warfare"` - Enclose phrases in double-quotes. ✍ `surface and undersea` - Finds PRs where both words appear in the same field ✍ `surface and not undersea` ✍ `surface or undersea` ✍ `surface near undersea` ✍ `(surface and undersea) or warfare` - Use parentheses to group terms ✍ `"war*"` - Finds "warfare", "warship", "warhead" ✍ `FORMSOF(INFLECTIONAL, rescind)` - Finds "rescinded", "rescinding", "rescission" The system updates its full-text index daily. The full-text index will not reflect changes made to documents. The system updates its full-text index overnight.
Practice PRs	Dropdown	Displays (or does not display) Practice PRs according to the selected choice. Choose from: Only, Included, or Excluded.

1.6 Workflow Page

The workflow page is also used to access packages. Packages are presented based on their state in the procurement workflow. Packages will be sorted by Active Documents and Things to Do. The Workflow Page does not contain filters. Packages where you are the Originator are listed here. The user can also access customer surveys from this page. Some additional context is shown on the Workflow page. Some action items are placed here because of activity within the system. Figure 17 below illustrates a Workflow Page.

Figure 17: Workflow Page

1.7   Roles and Permissions

Roles and Permissions define the privileges a user will have when using the SeaPort application.   Roles are requested by a SeaPort user and granted by a SeaPort User Administrator.

Users can register with SeaPort by selecting the Register link on the SeaPort home page. The user will enter identifying information and request a SeaPort role. Upon completion of the registration page, the SeaPort User Administrator will be notified.   As soon as the user's registration request is approved, the user will be notified via email. The registration page contains the fields shown in Table 7.

Table 7: Registration Page Fields

Field	Type	Description
Name	Text Box	Enter your full name using the format: First M. Last.

Field	Type	Description
Activity	Dropdown	Choose an activity from the list.
Organization	Dropdown	Choose an Organization from the list or leave blank for field activities.
Location	Text Box	Enter your Location.
Telephone	Text Box	Enter your telephone number using the format: nnn-nnn-nnnn.
Extension	Text Box	Enter your telephone extension, if applicable.
Fax	Text Box	Enter your FAX number using the format: nnn-nnn-nnnn.
E-mail	Text Box	Enter your e-mail address using the format: yourname@x.navy.mil.
Code	Text Box	Enter your Code.
Address	Text Box	Enter your street address.
City	Text Box	Enter the name of your city.
State	Text Box	Enter the 2-digit abbreviation for your state (DC, MD, VA, TX, etc.).
ZIP Code	Text Box	Enter your ZIP Code.
Time Zone	Dropdown	Select your time zone.
Roles		
SeaPort Guest	Check Box	You only need to create practice Purchase Requests or review documents.

Originator	Check Box	Check this box if you need to create, review, or edit Purchase Requests or you need to evaluate proposals. The PR Originator begins the actual process and inputs most of the data found in the PR.
		
		 Originators can be anyone who is authorized by the program manager.
		
		 Originators have the authority to:
		   ★ Initiate a new PR
		   ★ Initiate a modification
		   ★ Send a PR to SEA 02
		   ★ Forward a document to a reviewing official
		   ★ Update a PR
		   ★ Delete a PR

BFM	Check Box	The Business Financial Manager (BFM) is the only role that has the authority to update and enter financial accounting data into SeaPort. Additionally, the BFM can forward PRs to SEA 02 and can update a working Task Order. Check this box if you have the program authority to sign Financial sheets.

Field	Type	Description
TOM	Check Box	Task Order Managers are comparable to Contracting Officer's Representatives (COR) and/or Contracting Officer's Technical Representatives (COTR). If your COR/COTR training is current, you can request TOM privileges. The Task Order Manager acts as a procurement official through the preparation and definition of statement of work requirements and the evaluation of vendor proposals. The TOM role is similar to the current day Contracting Officer's Representative in that the TOM provides front line, day-to-day monitoring of the TO during execution. Essential to the TOM role is the maintenance of official files, including correspondence and past performance. The TOM is the only role that is able to create entries in the Task Order Evaluation.
Lawyer	Check Box	Check this box if you have NAVSEA authority to perform legal reviews.
PCO	Check Box	Check this box if you are a warranted NAVSEA contracting officer with authority to execute SeaPort task orders. The Procuring Contracting Officer is warranted and appointed by the Head of the Contracting Agency. The PCO is the only role that is able to issue a solicitation and award a Task Order.
1102	Check Box	Check this box if you work in the Contracts organization.
SEA01	Check Box	Check this box if you have authority to perform 1301 and 1517 reviews. Also check the FinancialReviewer and/or FinancialApprover checkboxes, and choose your SEA01 Division from the dropdown list. SEA 01 has a funding certification role in SeaPort acquisitions. SEA 01 has access to all sections of the PR and solicitation document and is the only role that is able to certify that funds have been Section 1301 and 1517 reviewed. Additionally, SEA 01 is the only role able to commit and post obligations.
Financial Reviewer	Check Box	Check this box if you contribute to use-of-funds reviews. Choose a SEA01 Division from the dropdown list.
Financial Approver	Check Box	Check this box if you sign off on use-of-funds reviews. Choose a SEA01 Division from the dropdown list.
SEA01 Division	Dropdown	This list is used in conjunction with the Financial Reviewer and Financial Approver roles.
Deputy for Small Business	Check Box	Check this box if you perform Small Business Review.
SeaPort Bid Event Creator	Check Box	Check this box if you have authority to perform SeaPort Bid Event creations.

Field	Type	Description
SeaPort Enhanced Bid Event Creator	Check Box	Check this box if you have authority to perform SeaPort Enhanced Bid Event creations.

2   Helpdesk Utility

This section details the Helpdesk Utility training session. The Helpdesk Utility training session follows the structure outlined in the _SeaPort II Training Plan_, Section 3.1: Training Methodology, and contains the key concepts outlined in Section 5: Training Curriculum

2.1   Explain

The instructor will explain how users may obtain support within the SeaPort portal.

2.1.1   Explanation

In addition to this training manual, the SeaPort system also offers Helpdesk support for government users. The primary channel for obtaining this support is to submit a Helpdesk ticket through the Helpdesk Utility.

SeaPort also offers a help support line: 301-939-1275. The availability of the help desk line is M-F, 0800 – 1700 (Eastern).

2.2   Demonstrate

The instructor will demonstrate the steps necessary to submit a trouble ticket using the test system. The screenshots and explanations included in this section are for reference and to assure that all functional areas related to the Helpdesk Utility are adequately covered.

2.2.1   Create New Helpdesk Ticket

Selecting the Helpdesk Login link in the Header navigation starts the Helpdesk process.

New Purchase Request	Document Library	Workflow Page	Bid Event Login	Helpdesk Login	Reports	ConOps	System Admin	My Profile

Figure 18: Header Navigation

A second window will automatically open and log the user into the Helpdesk Utility. From this screen, the user can classify the nature of the new helpdesk ticket and can supply a full description of the issue.
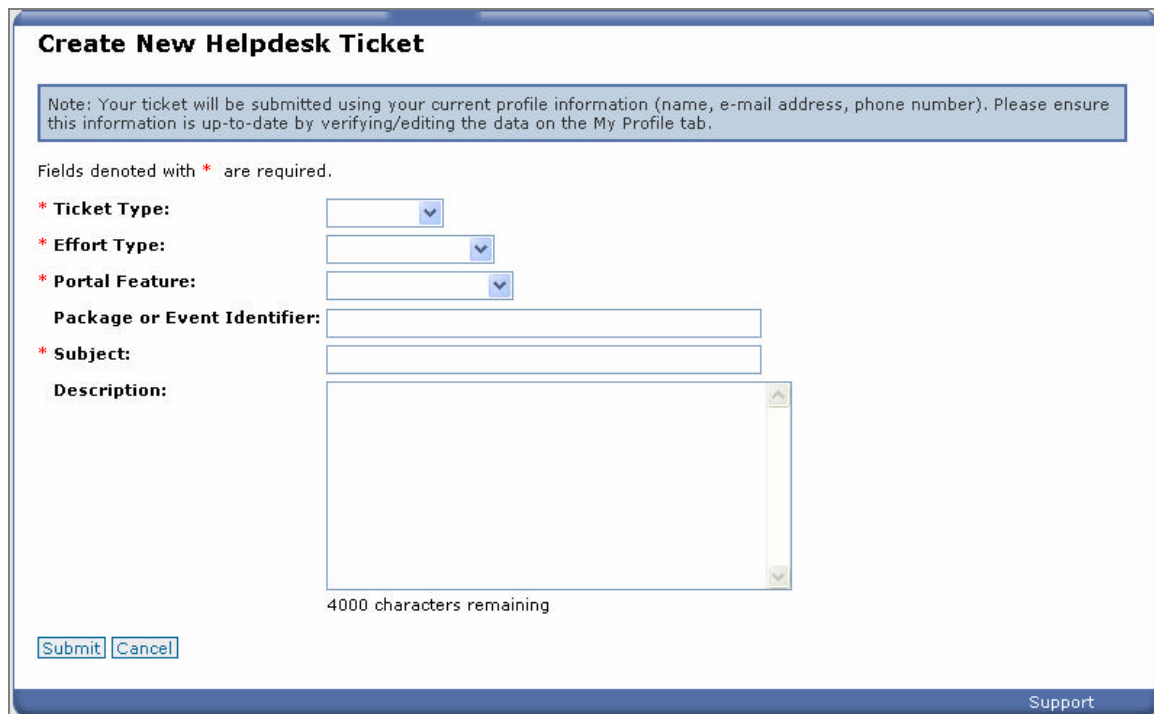
Figure 19: Create New Helpdesk Ticket

Available fields on the New Helpdesk Ticket screen are listed in Table 8 below.

Table 8: Create New Helpdesk Ticket Fields

Field	Type	Description
Ticket Type	Dropdown	Classifies the nature of the helpdesk ticket being submitted.
Effort Type	Dropdown	Identifies which SeaPort effort relating to the new helpdesk ticket being submitted.
Portal Feature	Dropdown	Identifies the SeaPort feature relating to the new helpdesk ticket being submitted.
Package or Event Identifier	Text Box	Allows the user to identify a specific procurement package or event relating to the new helpdesk ticket being submitted.
Subject	Text Box	Allows the user to supply a subject line describing the new helpdesk ticket being submitted.
Description	Text Box	Allows the user to provide a full description of the new helpdesk ticket being submitted.

Once submitted, the user will receive an email outlining the content of the helpdesk ticket submitted, and will be redirected to a confirmation message as seen in Figure 20 below
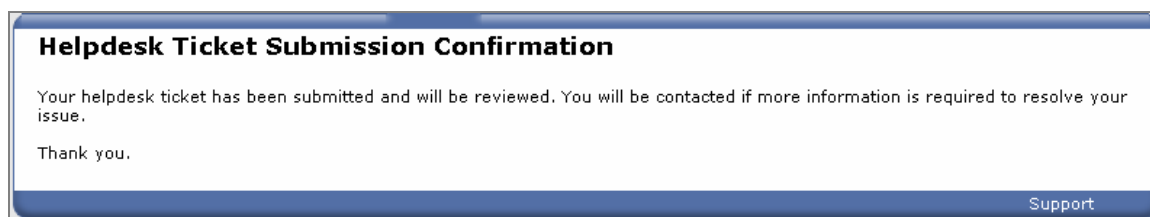
Figure 20: New Helpdesk Ticket Confirmation

3 Purchase Request

This section details the Purchase Request training session. The Purchase Request training session follows the structure outlined in the *SeaPort II Training Plan*, Section 3.1: Training Methodology, and contains the key concepts outlined in Section 5: Training Curriculum.

3.1 Explain

The instructor will explain the purpose of a Purchase Request and how a Purchase Request is used within SeaPort.

3.1.1 Explanation

A Purchase Request is the beginning of the procurement process. Information entered in the Purchase Request is the basis for the information that will populate the Solicitation Document. The purpose of the Purchase Request screens is to gather the information about a Purchase Request. Use the left navigation buttons to access all the related Purchase Request screens (Administrative, Pricing Structure, Requirements, Procurement, Attachments, Evaluation Team, and Criteria).

> **NOTE:** All times should be entered using local military time.

3.2 Demonstrate

The instructor will demonstrate the steps necessary to create a Purchase Request using the test system. The screenshots and explanations included in this section are for reference and to assure that all functional areas related to Purchase Requests are adequately covered.

3.2.1 Create Purchase Request using Wizard

The purpose of the Wizard screens is to ask initial questions about the Purchase Request being created. This will help facilitate entering the main data on the Purchase Request screens that follow.

The Purchase Request Wizard is the most common way of creating a Purchase Request. The goal of the Wizard is to obtain essential information quickly and easily to assist in processing the acquisition.

Information obtained using the PR Wizard interview format will be transferred to the Purchase Request panels in SeaPort. Any information entered using the PR Wizard may be edited later from within SeaPort.

The PR Wizard workflow is illustrated in **Error! Reference source not found.** below.

```
┌─────────────┐       ┌──────────────┐       ┌──────────────┐
│  Practice   │──────▶│ PR is flagged │──────▶│ PR is purged │
│    PR?      │       │ as practice  │       │ from system  │
└──────┬──────┘       │ and not      │       │ in 7 days    │
       │              │ included in  │       └──────────────┘
       │              │ reports      │
       │              └──────────────┘
       ▼
┌─────────────┐  SeaPort Enhanced  ┌──────────┐      ┌──────────────┐
│   Type of   │───────────────────▶│ Choose   │─────▶│ Small Business│
│   Effort    │                    │  Zone    │      │  Set Aside   │
└──────┬──────┘                    └──────────┘      └──────────────┘
       │
    SeaPort
       ▼
┌─────────────┐
│ What Services│
│ are you     │
│ buying?     │
└──────┬──────┘
       ▼
┌─────────────┐       ┌──────────────┐
│   Under     │──Yes─▶│ Enter previous│
│  Different  │       │ contract     │
│  Contract?  │       │ information  │
└──────┬──────┘       └──────────────┘
       │
      No
       ▼
┌─────────────┐   Sole Source   ┌──────────────┐
│ Competitive │────────────────▶│ Sole source  │
│ or Sole     │                 │ justification│
│ Source      │                 └──────────────┘
└──────┬──────┘
       │
   Competitive
       ▼
┌─────────────┐       ┌──────────────┐
│ Best Value  │──────▶│ Rate         │
│ or Low Cost │       │ evaluation   │
└──────┬──────┘       │ criteria     │
       │              └──────────────┘
       ▼
┌─────────────┐
│  Proposal   │
│ Requirements│
└──────┬──────┘
       ▼
┌─────────────┐
│ Include Award│
│ Provisions  │
└──────┬──────┘
       ▼
┌─────────────┐       ┌──────────────┐
│  Advanced   │──Yes─▶│ Enter Synopsis,│
│  Planning   │       │ POC, &       │
└──────┬──────┘       │ Applicable   │
       │              │ Dates        │
      No              └──────────────┘
       ▼
┌─────────────┐
│ Award Date  │
│ and Comments│
└──────┬──────┘
       ▼
┌─────────────┐       ┌──────────────┐
│  Route or   │──────▶│ Route Sheet  │
│  Continue   │       └──────────────┘
└──────┬──────┘
       ▼
┌─────────────┐
│ PR Admin    │
│ Panel       │
└─────────────┘
```

Figure 21: PR Wizard Workflow

Selecting the New Purchase Request link in the Header navigation starts the PR Wizard.

New Purchase Request	Document Library	Workflow Page	Bid Event Login	Helpdesk Login	Reports	ConOps	System Admin	My Profile

Figure 22: Header Navigation

The first page of the Purchase Request Wizard asks the user if this will be a practice PR. Practice PRs are not included in system metrics and are purged from the system in 7 days. Practice PRs are useful for new users to explore the system without the fear of doing damage. Should you wish to retain any of the information entered in a practice PR, the PR can be cloned before it is deleted from the system and that information will be placed into an official PR.
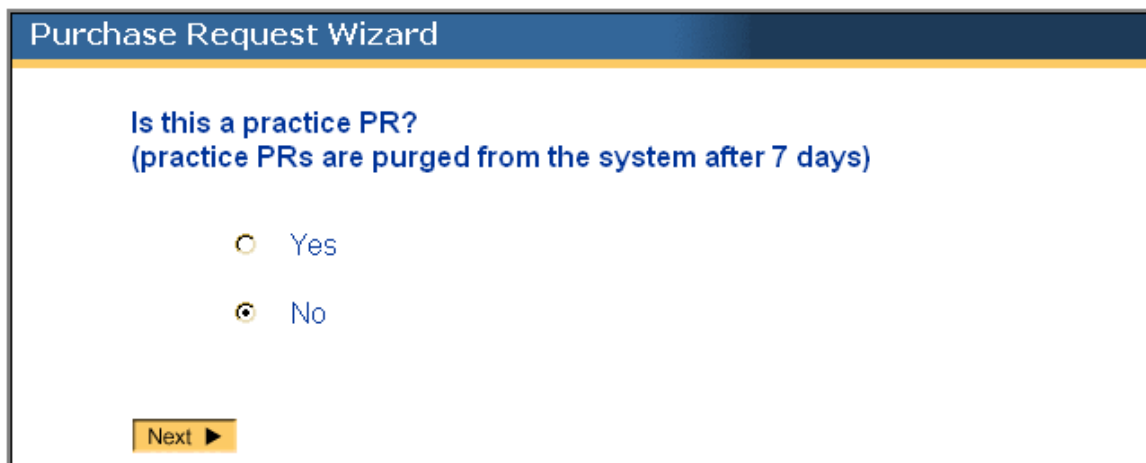
Figure 23: PR Wizard – Practice PR

The next page of the Purchase Request Wizard determines whether the user will require a SeaPort or SeaPort Enhanced effort type. This will depend on what contract you are procuring under. Professional Support Services (Seaport) is for Headquarters and Engineering, Technical and Programmatic Support Services (Seaport Enhanced) is for Field Activities.
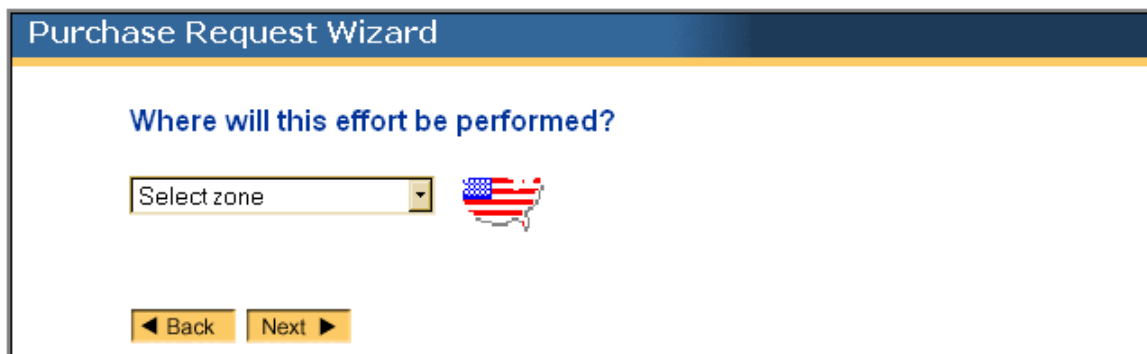
Figure 24: PR Wizard – Type of Effort

Should the user choose Engineering, Technical and Programmatic Support Services (Seaport Enhanced) in the PR Wizard page shown above, the next page of the wizard will ask the user to choose a Zone.

If you are unsure of which zone to choose, you may choose "Unknown" from the dropdown window or click on the map icon. The map icon will open a pop-up window containing a map of all zones. This zone map is displayed in Figure 26 below.

Figure 25: PR Wizard – Select Zone
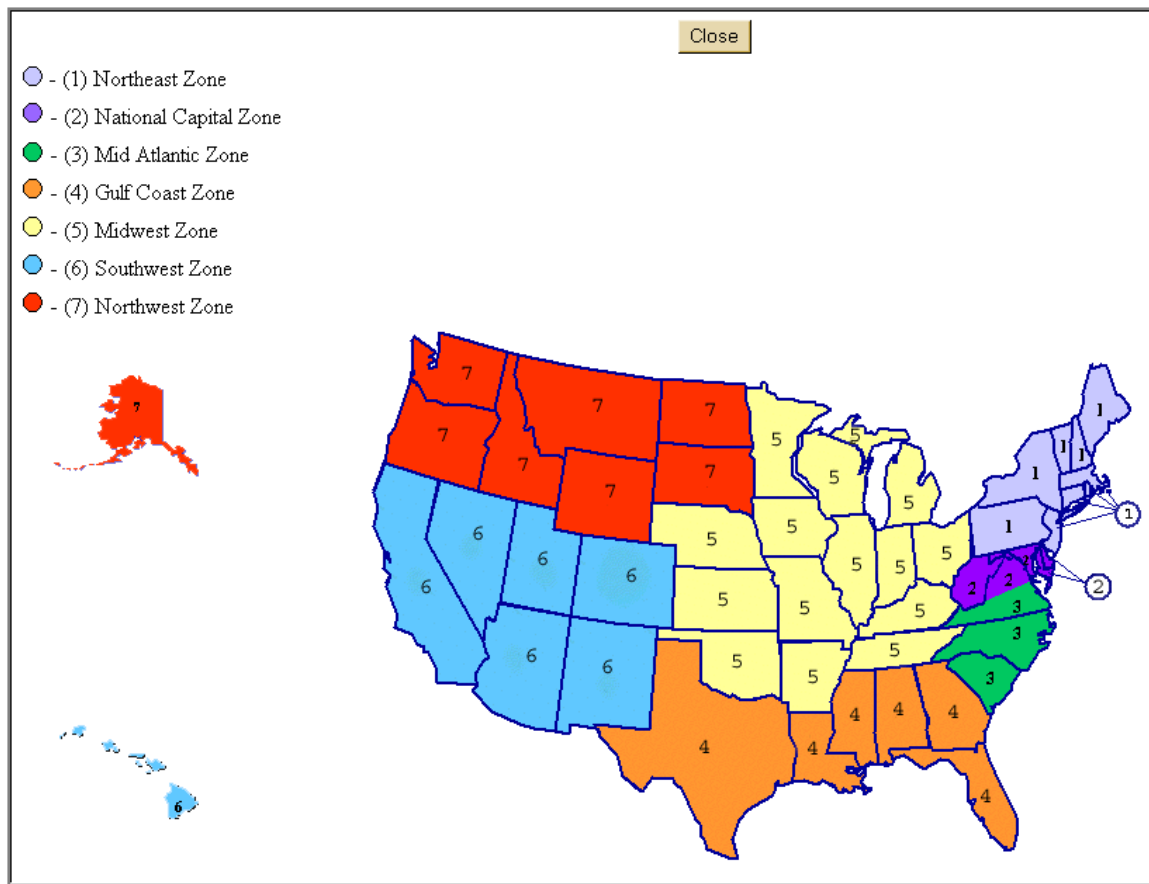
Figure 26: PR Wizard – Select Zone – Zone Map

The next page of the Purchase Request Wizard asks the user about Small Business Set Aside.

> **NOTE:** This is the first of several Wizard pages that include the "Don't Know" choice. While this is a valid choice at this stage in the procurement process, it must be modified before the Solicitation Document is released. Ultimately a substantive response must be chosen.

Figure 27: PR Wizard – Small Business Set Aside

The next page of the Purchase Request Wizard asks the user for information about services. For both Total Duration and Total Dollar Value, include your firm requirement to be awarded plus all standard and award term options for up to five years of requirements in these numbers. Potential award term options that extend beyond five years should not be included in this total.
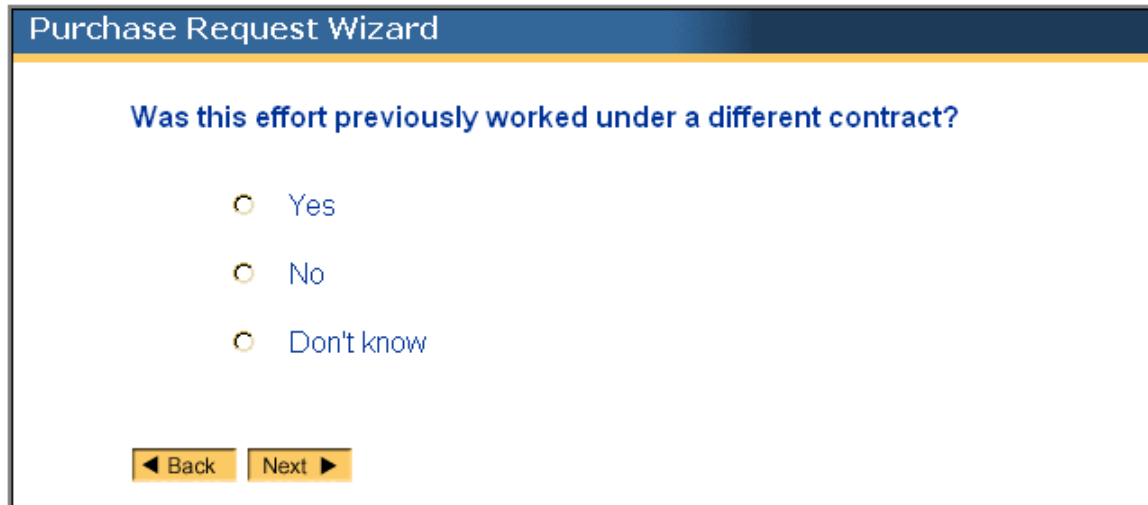
Figure 28: PR Wizard – Description of Services

The next page of the Purchase Request Wizard asks the user for information about previous contracts.

Figure 29: PR Wizard – Previous Contract

If the effort was previously worked under a different contract, the user will be asked whether this effort was previously obtained through a Non-DOD vehicle (i.e. GSA, GovWorks, or the Department of the Treasury).
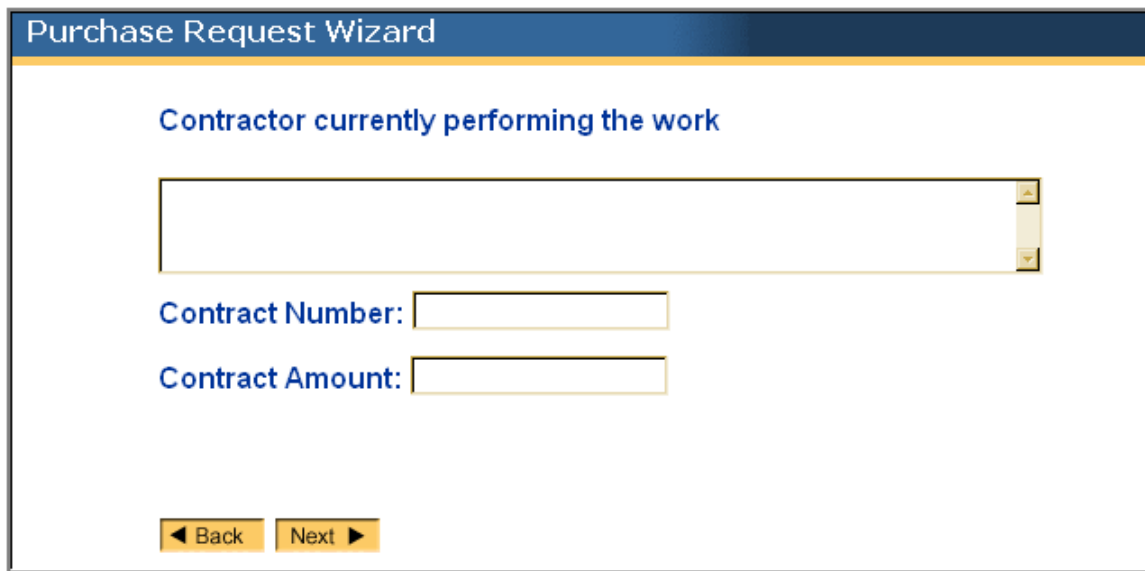
Figure 30: PR Wizard – Previous Contract Details #1

The user will then be asked to enter additional information about the previous contract. This information includes the contractor, the contract number and the contract amount.
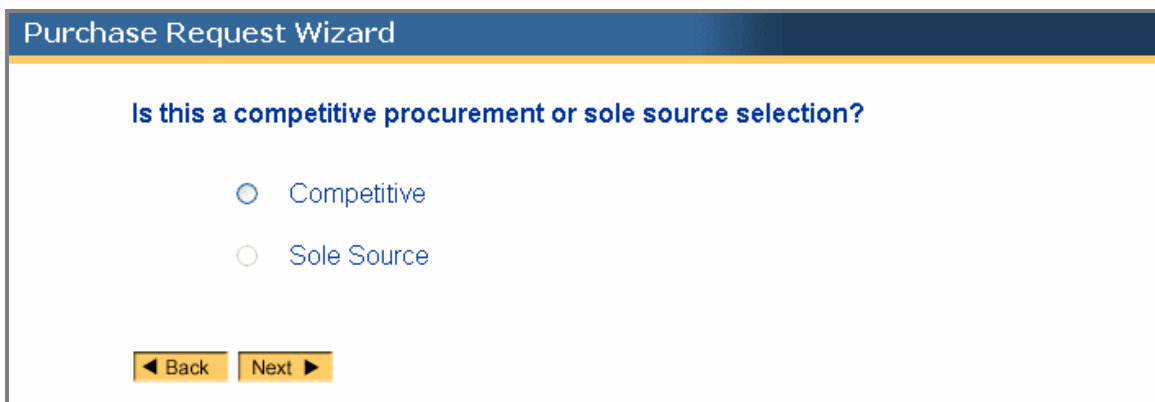
Figure 31: PR Wizard – Previous Contract Details #2

The next page of the Purchase Request Wizard asks the user for information about the selection process.

All MAC holders will be given a *Fair Opportunity to Compete* (FOTC) for prospective task orders under SeaPort. Therefore, the Sole Source option has been disabled, and the user must select Competitive.

Figure 32: PR Wizard – Competitive or Sole Source

The next page of the Purchase Request Wizard asks the user to choose best value or low cost.

The program manger needs to determine if the competition will be evaluated on a best value to the Government basis or on the low cost/technically acceptable basis. If best value is to be used, the importance of the factors (technical, past performance, and price) must be determined. The order of importance of factors is at the discretion of the program office, based upon what is in the best interest of the program. These areas should correspond with and relate to the specific requirements set forth in the Statement of Work.
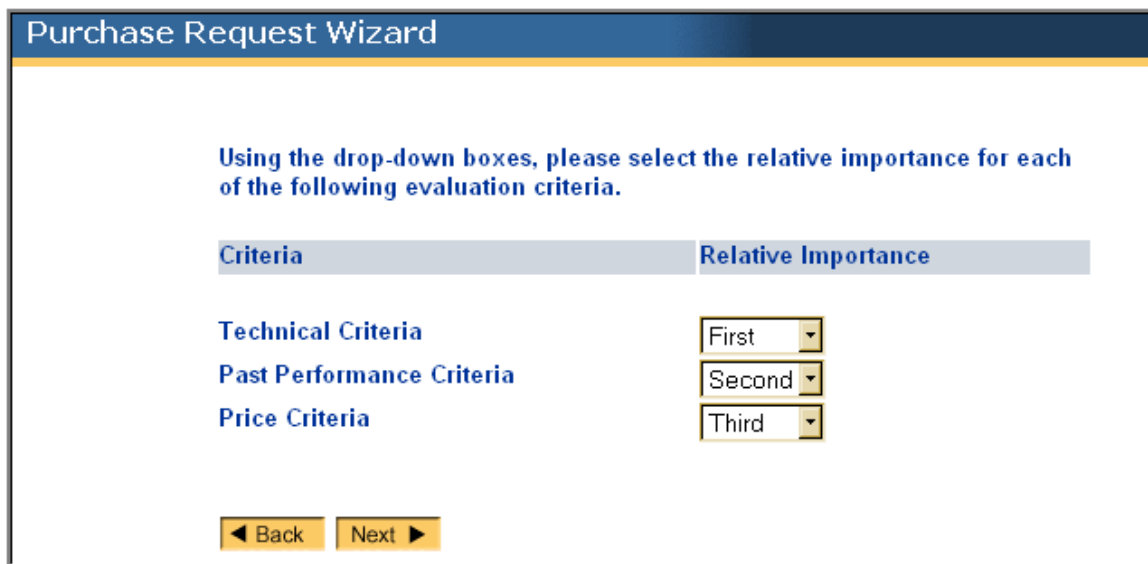
Figure 33: PR Wizard – Best Value or Low Cost

The next page of the Purchase Request Wizard asks the user for information about the relative importance of the following:

- Technical Criteria
- Past Performance Criteria
- Price Criteria

Figure 34: PR Wizard – Evaluation Criteria

The next page of the Purchase Request Wizard asks the user for information about proposal requirements and evaluation criteria.
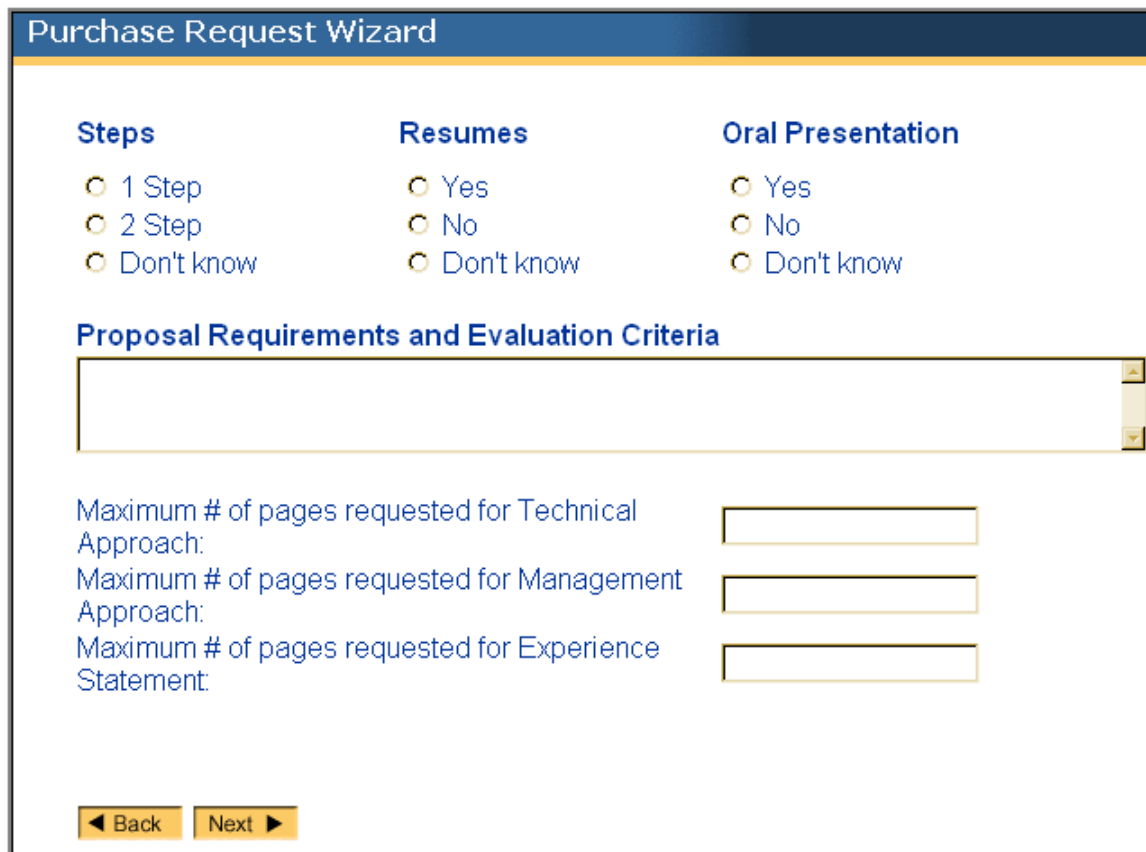
Written Proposals

If you select to receive written proposals, you need to decide how many pages the bidders can submit for their technical approach, their management approach, and their

experience statement. You can also choose whether or not to receive resumes from those individuals who would be performing the service.

Oral Presentations

If you select to have oral presentations, you need to decide how long the presentations will be. You can also choose if you would like to receive written overviews to review. Indicate this information in the Proposal Requirements and Evaluation Criteria text field.
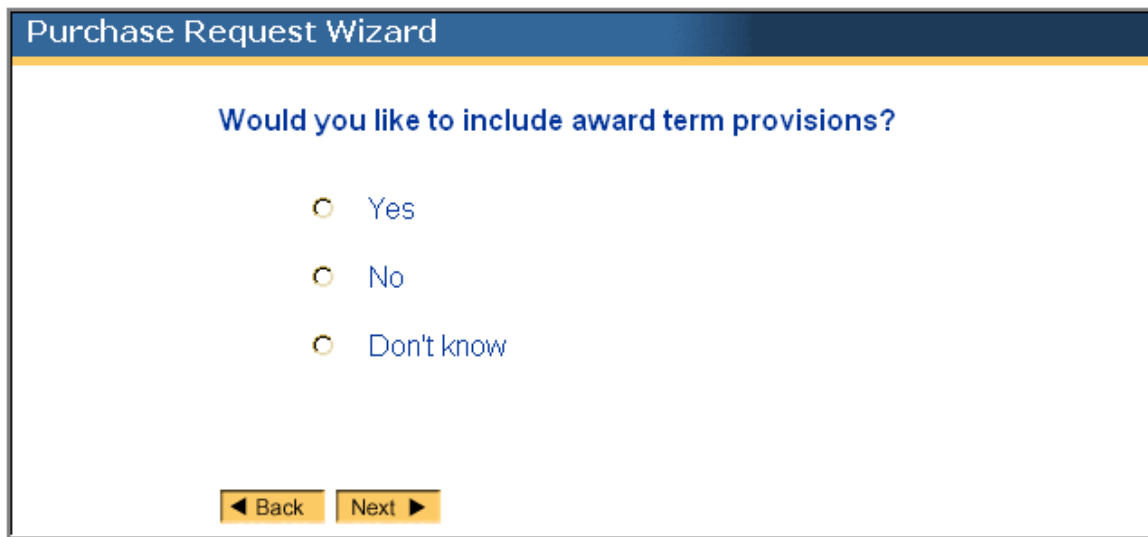
Figure 35: PR Wizard – Proposal Requirements

The next page of the Purchase Request Wizard asks the user whether or not to include award term provisions. Choosing Yes here inserts the provisions and clauses in the Requirements.
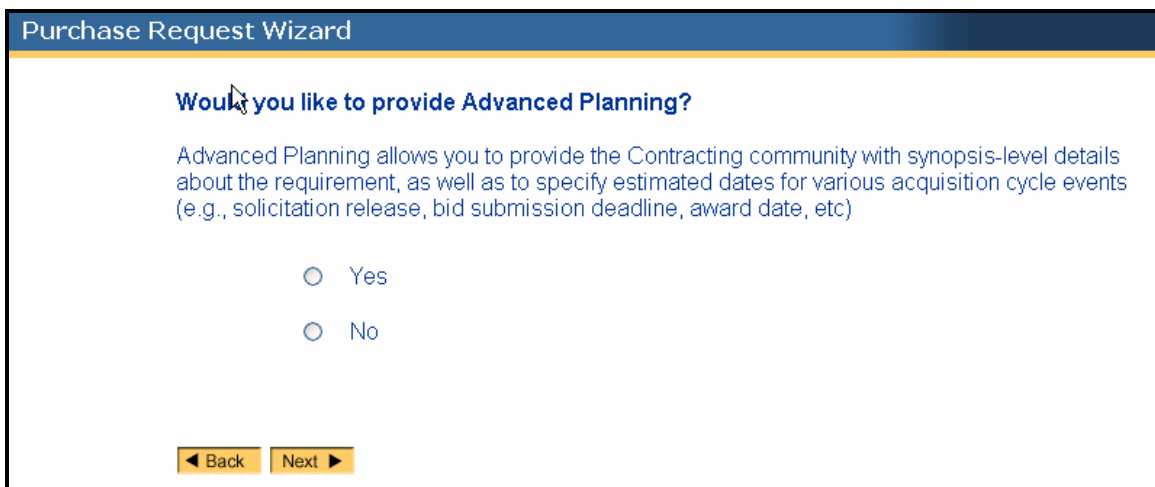
Figure 36: PR Wizard – Award Term Provisions

The next page of the Purchase Request Wizard asks the user whether they wish to provide Advanced Planning.

Figure 37: PR Wizard – Award Date

If the user chooses Yes to include Advanced Planning, the Purchase Request Wizard will prompt the user for a description of the event, point of contact, and dates for various milestones in the process.

Figure 38: PR Wizard – Award Date

The next page of the Purchase Request Wizard asks the user for the award date and additional comments. Use the calendar icon to conveniently enter the Date.

Figure 39: PR Wizard – Award Date

3.2.1.1   Calendar Utility
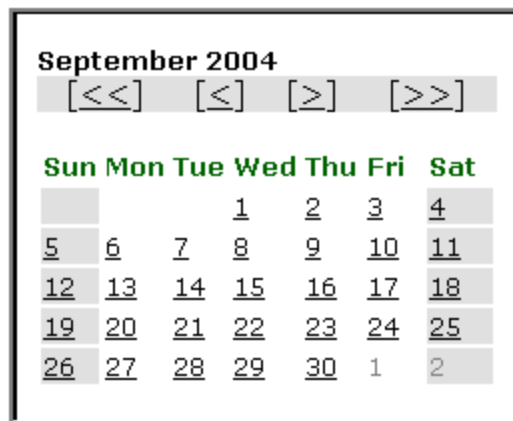
The calendar utility is available wherever you see the calendar icon [icon]. Clicking on the calendar icon will open a popup window as shown in Figure 40 below. The following controls are available from this window.

Table 9: PR Wizard – Award Date – Calendar Utility – Controls

Control	Description
[<<]	Move backward one year at a time.
[<]	Move backward one month at a time.
[>]	Move forward one month at a time.
[>>]	Move forward one year at a time.
Date	Clicking on a date will enter that date into the selected field and close the calendar window.
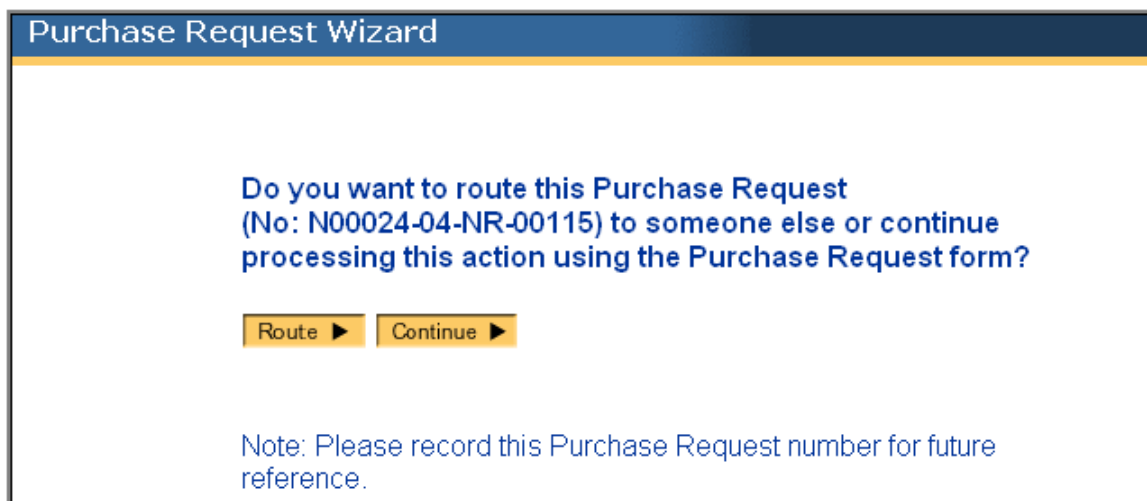
Figure 40: PR Wizard – Award Date – Calendar Utility

The next page of the Purchase Request Wizard provides the Purchase Request number and gives the user the opportunity to Route the Purchase Request or Continue. Routing the PR to another user gives that user the opportunity to review and to comment on the data that has been entered up to this point. When the other user has finished reviewing the PR information he can route it back to the Originator or to another user. A PR that has been routed to a user will appear in that user's mailbox.

   ✎ By selecting Continue, the user will see the main PR panels. All of the information that was entered into the Wizard will be auto-populated into the appropriate place in the main PR panel.

   ✎ By selecting Route, the Originator can display the Route Sheet for the Purchase Request created through the Wizard and use it to route the Purchase Request to other users for input before sending to SSAPO.

Figure 41: PR Wizard – Route PR

3.2.1.2   Route

SeaPort workflow enables users to route action items to other authorized users by choosing the *Route* button found on the document's Package tab. The routing convention used by SeaPort is ad hoc. Users are prompted to recommend a routing, but that routing is not forced. Users should be aware that workflow routing does not take place concurrently. If a PR is routed to another person for action, nobody other than that person will have access to any information (other than read only). Because of this non-concurrent routing, it is important that information be routed to the right person.

SeaPort notifies users via e-mail that a purchase request has been routed to them.
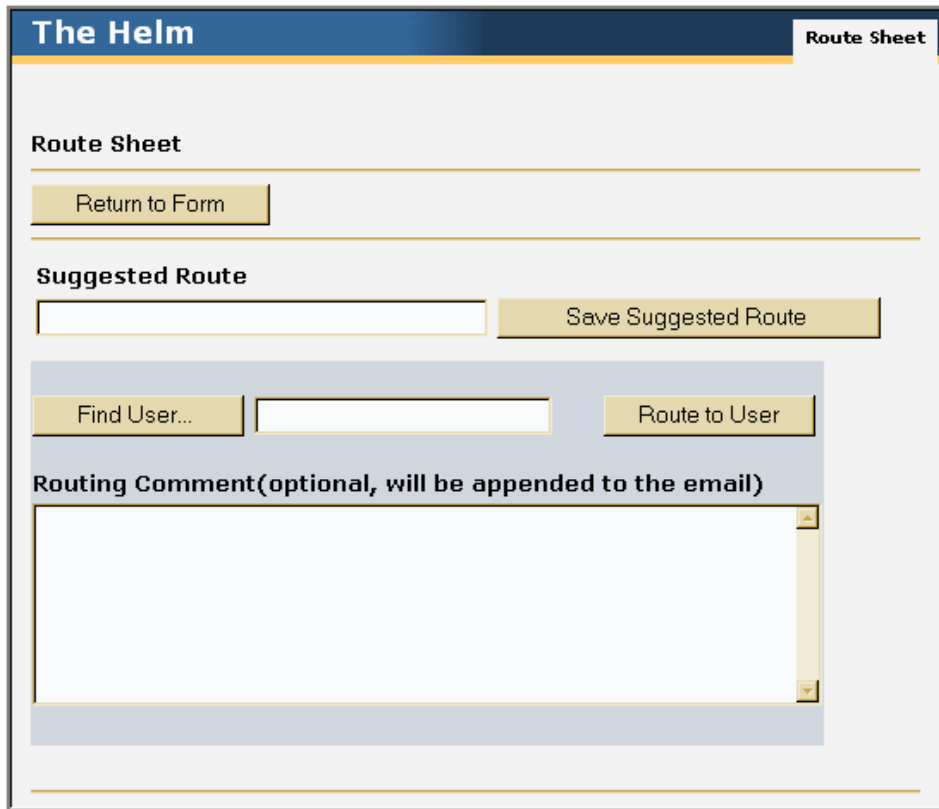
Selecting Route will display the Route Sheet for the PR shown in Figure 42 below. It contains the following data fields and buttons.

Table 10: PR Route Sheet – Fields

Field	Type	Description
Suggested Route	Text Box	Enter a suggested route (i.e. user names) to be used by subsequent routees. **Note:** This selection does not actually route the document.
User Name	Text Box	Enter the user name that the document will be routed to using the Find User button and the User Search utility.
Routing Comment	Text Box	Enter general comments to be reviewed by subsequent routees.

Table 11: PR Route Sheet – Buttons

Button	Description
Return to Form	Goes back to the current document. The Administrative page of the Purchase Request is displayed.
Save Suggested Route	Saves the entry in the Suggested Route field.
Find User	Allows the user to search for routees. Opens the User Search utility (detailed in section 3.2.1.3 below).
Route to User	Routes the document to the user named in the User Name field.

Figure 42: PR Wizard – Route

3.2.1.3   User Search

The User Search utility is available from various points within SeaPort. It is used to automatically populate user name fields that appear throughout SeaPort. The User Search utility allows you to search for a user from a list of all SeaPort users. Search results may be filtered by Activity, Role, or Name to make it easier to find the person you are looking for.
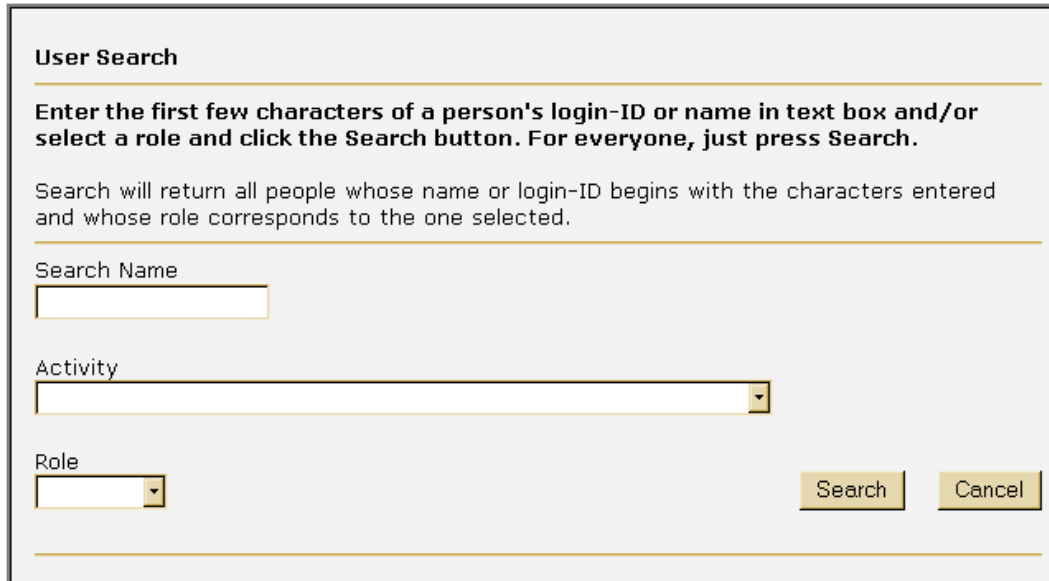
The User Search utility contains the following data fields and buttons.

Table 12: User Search – Fields

Field	Type	Description
Search Name	Text Box	Enter all or part of the name you wish to search for.
Activity	Dropdown	Select an Activity from the dropdown list to limit the search results to just those SeaPort users who are a member of that Activity. **Note:** This field corresponds to the Activity chosen when the user was registered.
Role	Dropdown	Select a Role from the dropdown list to limit the search results to just those SeaPort users who are assigned that Role. **Note:** This field corresponds to the Role or Roles assigned when the user was registered.

Table 13: User Search – Buttons

Button	Description
Search	Begins the search.
Cancel	Cancels the search and closes the User Search window.

Figure 43: User Search

Search results are displayed in the User Search window as a table. These results appear below the search criteria. An example of a search results table is displayed in Figure 44 below. The ✔ icon is used to make a selection. Clicking a user's ✔ icon will insert that user's name into the selected field.

Figure 44: User Search – Results Table

3.2.2   Create Purchase Request by cloning

After selecting an existing PR from the document library the Package panel is displayed. Use the clone icon 📑 on this page to create a new PR with the same attributes. The clone icon can be found in the Actions column in the Package Documents section of the page. You can clone a PR that you created or that another user created. Cloning a PR is a method of re-using work that has already been completed. Should you need to create a PR with much of the same data as another PR in the system, you can clone the original PR and then edit it to suit your needs. Cloning a PR is a way to avoid having to start the procurement process from scratch.

TIP: If you create a practice PR using the PR wizard and later decide that you would like to use the data that was entered, you can clone the practice PR before it expires and is purged from the system (7 days).

Figure 45: Package Home

Selecting the clone icon will display the following window.
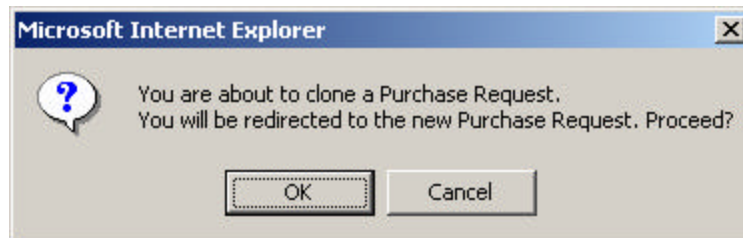
Figure 46: Clone PR

Selecting OK will create a new purchase request with the same attributes as the one that is cloned. The Administrative data panel of the new purchase request will be displayed. See section 3.2.3 for more information on the Administrative Data panel.

3.2.3 Add Administrative data

The Administrative Panel contains all information required to properly administer an acquisition. Included are Originator, Activity, Task Order Manager, and Financial POC information. Most of the Originator Information will be auto-populated. All of the Administrative fields must be furnished before it is eligible to be processed. It contains the following data fields and buttons.

> **NOTE:** Some actions require specific levels of authority within the system. Not all buttons will be available to all users.

Table 14: PR Administrative Panel – Fields

Field	Type	Description
Originator	Read Only	This field is pre-filled based on the login ID of the person who originated the PR.
Edit	✎	Allows the user to select an Originator using the User Search function (described in section 3.2.1.3 above).
User Information	👤	View the SeaPort Profile of the Originator or the Task Order Manager (TOM).
Program Office	Text Box	Enter the name/number of the Program Office.
Originator's Office	Read Only	This field is pre-filled based on the User Profile of the person who originated the PR.
Date of Origination	Read Only	This field is pre-filled based on the system date.
Code	Read Only	This field is pre-filled by SeaPort.
Activity	Dropdown	Choose an Activity from the list.
Organization	Dropdown	Choose an Organization from the list.
Requisition No.	Dropdown	This is a text field. Enter any external references or references to other systems here. If this does not apply, enter "N/A". This field is required.
Task Order Manager Name	Dropdown	Choose the name of a Task Order Manager from the list. The dropdown list will contain only those TOMs that are in the Activity specified above. To see a list of all TOMs in the system, use the View All icon 👥 described below. The function of TO Manager is to certify work order for payments to be made. Similar to a Contracting Officer's Representative (COR), the Task Order Manager or TOM is the individual who acts as a procurement official through the preparation and definition of statement of work requirements and the evaluation of vendor proposals. The TOM provides front line, day-to-day monitoring of the task order during execution. Essential to the TOM is the maintenance of official files, including correspondence and past performance. The TOM is the only one who is able to create entries in the Task Order Evaluation within the SeaPort portal. Contact a SeaPort contracting officer if you are not sure who would serve as the TOM for the services that being requested.
View All	👥	View a list of all TOMS in the system. This list opens in a pop-up window and resembles the search results table shown in section 3.2.1.3 above. Choose a user by selecting that user's ✓ icon.

Field	Type	Description
POC (Point of Contact)	Text Box	The financial point of contact (POC) is most likely the Business and Financial Manager (BFM) for the program/program office that is requesting the services. This information is needed in case SEA 02 or SEA 01 has questions about the funding of the procurement. This person can be either the BFM or the Originator, whoever has Program Manager cognizance over the funding. Contact a SeaPort contracting officer if you are not sure who your financial point of contact is for the services being requested.
Zone of Performance	Dropdown	Choose a zone of performance from the dropdown list. Zones can be displayed by selecting the zone map icon.
Display Zone Map		Displays a geographical color-coded zone map in a pop up window. The zone map is shown in Figure 26 above.
Set Aside	Dropdown	Set Aside will be the attribute of the package and can be changed through the Purchase Request/Solicitation stages of the package until the Solicitation is released. Choose No, Full Set Aside, Protected 8(a), Protected SDVOSB, Protected HUBZone, or Cascade. If user selects one of the Set Aside options, Section M will be automatically populated with the appropriate Set Aside clause. If user selects "Cascade", Section M will be automatically populated with Cascading Set Aside clause. If user selects "No", no Set Aside provisions are automatically inserted in to Section M. **Note:** If the original selection is changed, the user must manually update Section M on the Requirements panel and PCO Set Aside Review on the Small Business panel. The system does not automatically update that information.

Table 15: PR Administrative Panel – Buttons

Button	Description
Save	Pressing this button updates information in the database. **Note:** Data is automatically saved when using the left navigation.
Validate PR	Pressing this button ensures that all required fields have been entered. If all required fields have not been entered, the system notifies user of an error condition. This notification is in the form of a message window indicating the missing fields.

Button	Description
Create Solicitation	Pressing this button causes the system to run a validation routine ensuring that the draft PR has all required fields populated. If true, the system successfully validates and creates the draft solicitation. If the validation fails, the system reports the errors requiring attention via a message box. Upon successful validation the system generates a draft solicitation, provides a unique solicitation number, and populates most of the solicitation fields with the data from the PR. **Note:** Only a PCO will have the authority to create a solicitation. Other users will not have this button available.
Printable PR	Pressing this button opens a new browser window containing a form that displays all of the PR information from all Panels. This form is read only and is specially formatted for better printing results.
1102 Sandbox	Pressing this button opens a new browser window containing a form that can be used to store temporary 1102 information.
Printable PR Pricing	Pressing this button opens a new browser window containing a printable version of the Purchase Request's pricing structure.

NOTE: The Save, Validate PR, Create Solicitation, Printable PR, 1102 Sandbox, and Printable PR Pricing buttons are common to several of the PR panels. They always perform the same function.
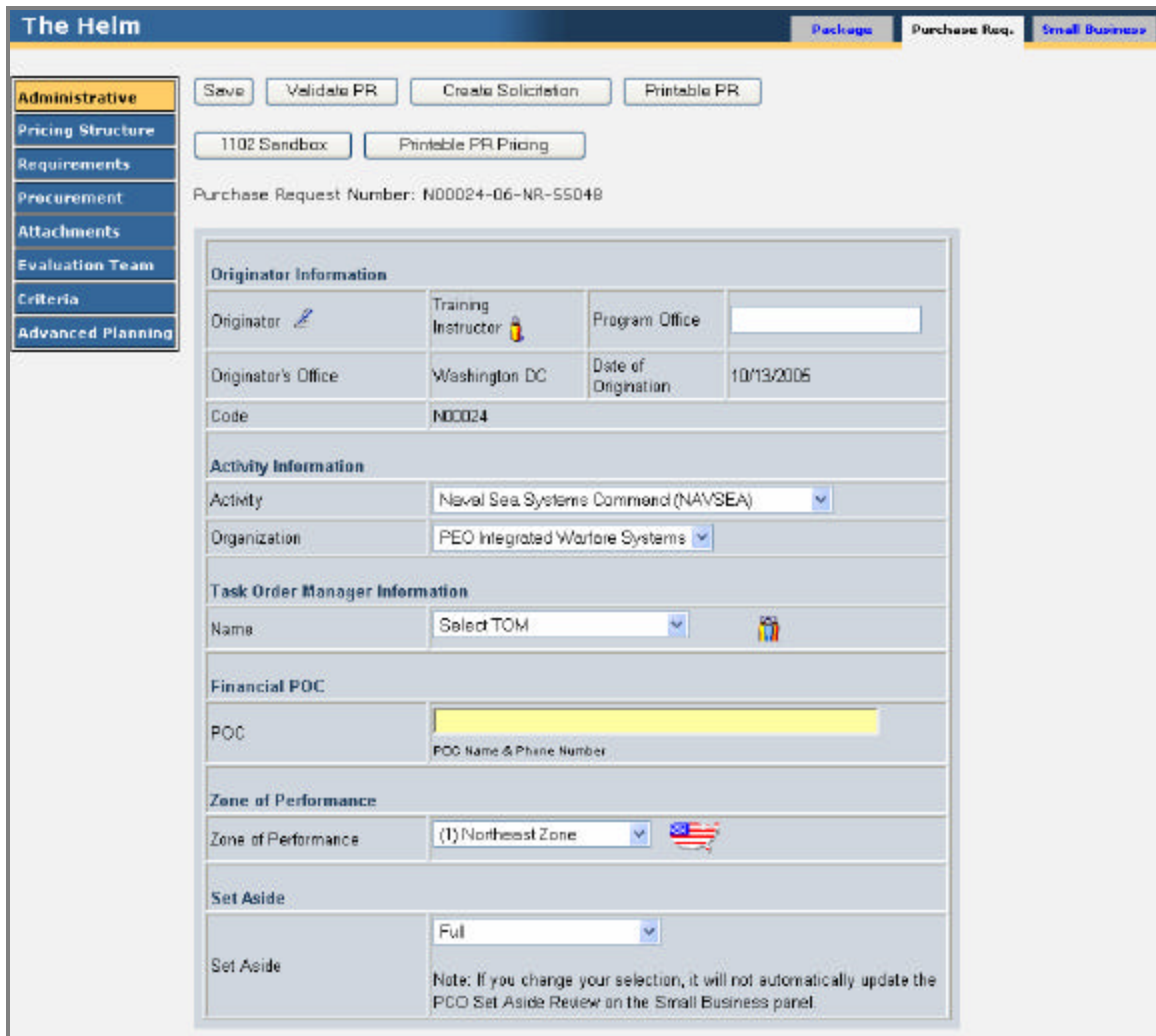
Figure 47: PR – Administrative

3.2.4   Add Pricing Structure data

The purpose of the Pricing Structure Panel is to lay out the Contract Line Item Number (CLIN) structure of the Task Order. The basic MAC contracts have within them a uniform CLIN structure based upon contract type. The Purchase Request Pricing Structure panel replicates this structure. Information such as Total Duration and Estimated Total Cost will be provided by the Purchase Request Wizard. The Pricing Structure panel contains the following data fields and buttons.

Table 16: PR Pricing Structure Panel – Fields

Field	Type	Description
Total Duration (in years)	Text Box	Enter the total duration of the contract.

Field	Type	Description
Estimated Total Cost	Text Box	Originators should enter their best estimate about these values. This is for planning purposes only, but all fields must contain a value. Enter the estimated total cost of the contract.
New CLIN Window		
CLIN ID	Text Box	Choose from 0001 – 0009 or 1000-9999 (for SeaPort-e). Each CLIN ID corresponds to a specific cost type and period of performance. See table in Figure 49.
CLIN Category	Radio	Choose whether to add an Informational or Priced CLIN.
Short Description	Text Box	Enter a short description for the CLIN up to 1000 characters.
Automatically create ODC	Check Box	Select this check box to automatically create an ODC CLIN when creating a Cost Type CLIN.

Table 17: PR Pricing Structure Panel – Buttons
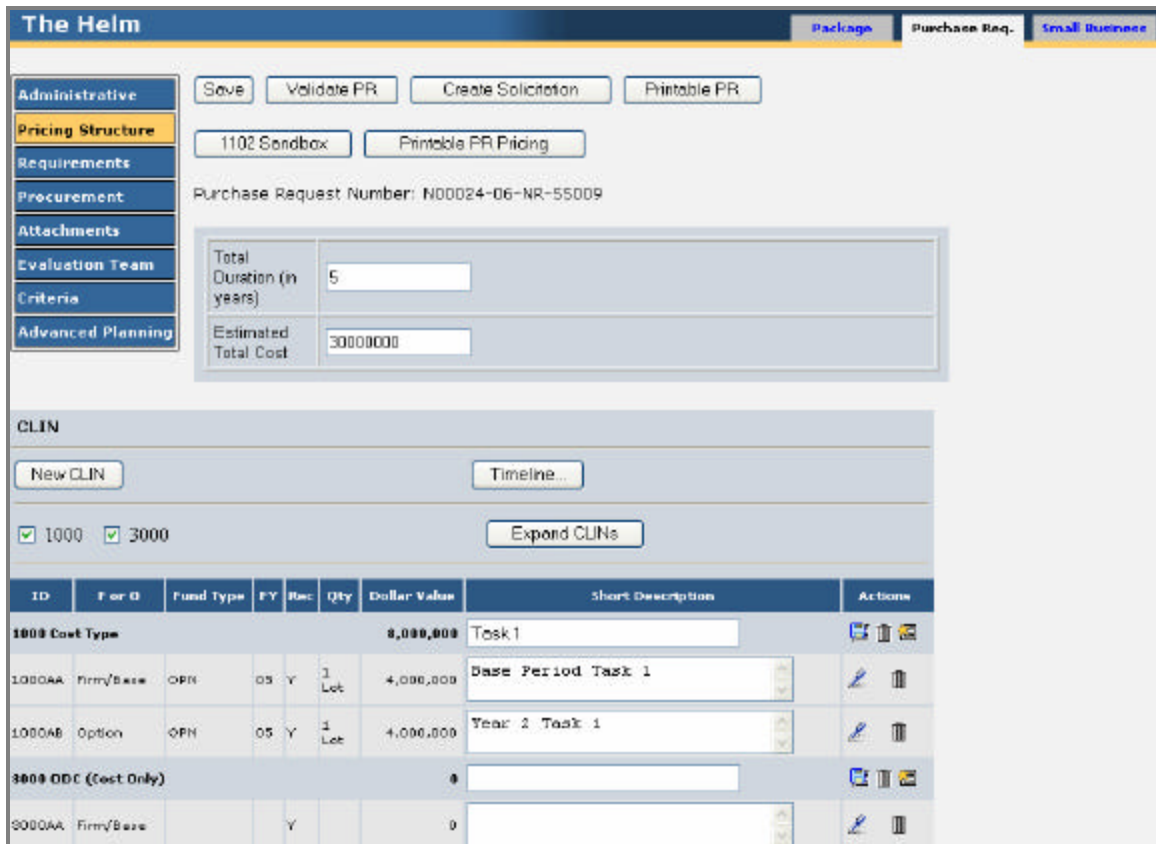
Button	Description
New CLIN	Click the *New CLIN* button to add a contract line item number (CLIN). You must also enter categorize the new CLIN as Informational or Priced and supply a short description. When adding the first Informational Cost Type CLIN, the system will automatically add the first Cost Type SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields. When adding a Priced CLIN, you will add detail on the following screen.
CLIN/SLIN Wizard	Opens the Pricing Line Item Wizard described in section 3.2.4.3 below (applicable only to SeaPort-I procurement efforts).
Timeline…	Opens the Timeline window described in section 4.2.2.3 below.
Expand CLINs	Allows the user to see all SLINs associated with a CLIN. CLINS are presented with the details collapsed when the page length exceeds the system-defined limit (this is rare).
Actions	Choose the new document icon 📑 to create a new SLIN. Choose the pen icon 🖊 to edit, the trashcan icon 🗑 to delete, or the disk icon 💾 to save.

Table 18: SLIN / Priced CLIN Detail - Fields

Field	Type	Description
SLIN ID #	Text Box	Enter a valid 2-letter combination. User should enter SLINs sequentially starting with AA. This field is displayed only for Informational CLINs.

Field	Type	Description
CLIN #	Read Only	Displays the CLIN ID # (this field is displayed only for Priced CLINs)
Fund Type	Dropdown	Choose from the list. See table in Figure 56.
FMS Case Number	Text Box	If FMS funding is used, specify the case. Enter the case number in the format AA-A-AAA.
Firm or Option	Dropdown	Enter whether this requirement will be placed at time of award or if it is a future requirement. Choose Firm or Option.
Fee Type	Dropdown	Choose Fixed, Award, or Incentive.
Unit of Issue	Dropdown	Choose Labor Hours, Lot, or Labor Years.
Fiscal Year	Dropdown	Enter the fiscal year for the money being used. Choose the last 2 digits of the fiscal year from the list.
Cost Plus Fee	Text Box	Originator should enter their best estimate. This is for planning purposes only, but all fields must contain a value. Enter the dollar amount. (14 digit limit)
Quantity	Text Box	If level of effort, your estimate of the number of man-hours required. If completion, enter the numeral 1; unit of issue is "Lot". Enter the quantity. (9 digit limit)
Recurring Cost	Radio	Choose Yes or No.
Performance Based	Radio	Choose Yes or No.
Unit Price/Total Price	Read Only	This field is calculated based on other data.
Service Contract Act Applicable	Radio	Choose Yes or No.
Period of Performance	Dropdown	_Select a Period_ Enter when performance starts and when performance ends. Choose From and To dates using the dropdown lists.
	Text Box	_Enter Days After Award_ Enter the length of the period of performance in days (only available for option SLINs).
Short Description	Text Box	Enter a very short description (e.g., "Logistics Support for SEA 02") that will appear in Section B of the Task Order. Enter up to 1000 characters.

Figure 48: PR – Pricing Structure

3.2.4.1 New CLIN

The SeaPort system supports CPFF, CPAF, CPIF, FFP, and Cost Type CLINs.

Selecting the *New CLIN* button will open the window shown in Figure 49 below as a pop up. After selecting New CLIN the user must select from the drop down list the appropriate CLIN number that they wish to procure with and provide a short description of the new CLIN. The basic MAC contracts have within them a uniform CLIN structure based upon contract type. After clicking "Save," the CLIN is added and the user is returned to the main panel.

3.2.4.1.1 CLIN Structure

The MAC contracts contain contract line item numbers (CLINs) that can accommodate both Cost-Plus-Fixed Fee and Firm Fixed Price requirements. Each of these CLINs has a five-year period of performance. Including options, the maximum total potential duration of the MAC contracts is fifteen years. Every Task Order will follow the same general CLIN structure that was established in the MAC contracts:

- ✍ **COST-PLUS-FIXED FEE (CPFF/CPAF/CPIF)** Item 0001 (1000 for SeaPort-e), Option Items 0004/4000 and 0007/7000 - All requirements for Cost-plus-Fixed Fee (CPFF) level of effort (hours) or completion type services will be placed under these CLINs. Other Direct Costs, e.g. travel, associated with performance of work under these CLINs are included separately under Item 0003 (3000 for SeaPort-e) and option Items 0006/6000 and 0009/9000 since contractors will not be paid any fee on the ODC costs.

- **FIRM FIXED PRICE (FFP)** Item 0002/2000, Option Items 0005/5000 and 0008/8000 - All requirements for firm fixed price level of effort (hours) or completion type services will be placed under these CLINs. Included in the price are all direct and indirect costs, including Other Direct Costs, to complete the effort and profit.

- **COST ONLY** Item 0003/3000, Option Items 0006/6000 and 0009/9000 - These are cost only CLINs (contractor receives no fee) where contractors will be reimbursed for the allowable, allocable and reasonable other direct costs (ODCs) required to perform effort under Items 0001/1000 and Option Items 0004/4000 and 0007/7000. These items may include costs such as travel, facilities, incidental supplies, and mailing/packaging costs. Whether or not a specific type of charge should be classified as an ODC directly chargeable to the contract will depend on the Contractor's accounting system.

Create New CLIN

Please enter a CLIN ID:
Note: *New CLIN ID scheme (1000 - 9999) pertains to SeaPort-e efforts only. SeaPort-I efforts will use the CLIN IDs ranged from 0001 - 0009.*

| |

Cancel   Next

Valid CLINS are:

Cost Type:	0001, 0004, 0007, 1000's, 4000's, and 7000's
Firm Fixed Price:	0002, 0005, 0008, 2000's, 5000's, and 8000's
ODC (Cost Only):	0003, 0006, 0009, 3000's, 6000's, and 9000's

Period of Performance for each CLIN is as follows:

CLINS	Period of Performance
0001 or 1000's	05-APR-04 TO 04-APR-09
0002 or 2000's	05-APR-04 TO 04-APR-09
0003 or 3000's	05-APR-04 TO 04-APR-09
0004 or 4000's	05-APR-09 TO 04-APR-14
0005 or 5000's	05-APR-09 TO 04-APR-14
0006 or 6000's	05-APR-09 TO 04-APR-14
0007 or 7000's	05-APR-14 TO 04-APR-19
0008 or 8000's	05-APR-14 TO 04-APR-19
0009 or 9000's	05-APR-14 TO 04-APR-19

Figure 49: PR – New CLIN – SeaPort Enhanced Periods of Performance

Next, the user will be prompted to categorize the new CLIN as either an Informational CLIN (with funding at the SLIN level) or Priced CLIN (funding at CLIN level). **Note:** Should a user select Priced CLIN, they will have the option of adding Informational SLINs in order to break out Fund Types and Lines of Accounting. For more information on Informational SLINs to a Priced CLIN, refer to Section 5.2.3.2.3.1.

Create New CLIN

Please choose a CLIN category below:

○ Informational

○ Priced

[Previous] [Next]

Figure 50: PR – New CLIN – CLIN Categorization
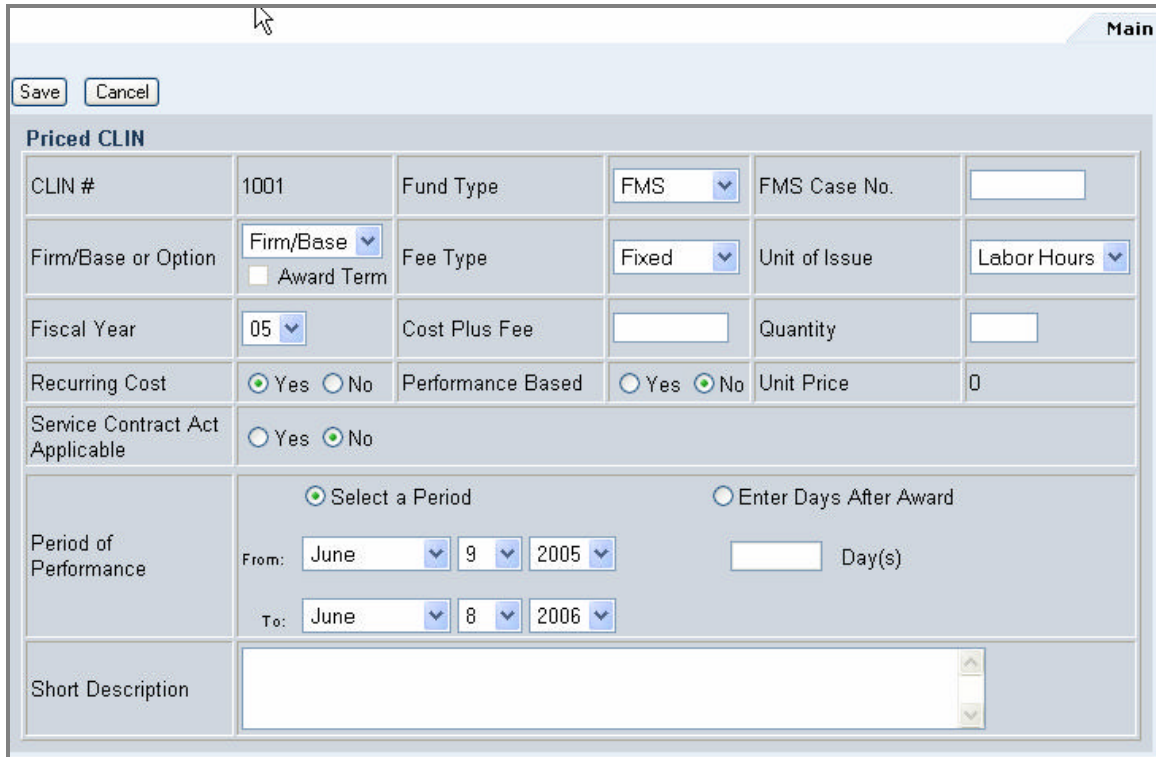
For Informational CLINs, SeaPort will then prompt the user for a Short Description.

Create New CLIN

CLIN ID: 1001

Short Description

☑ Automatically create ODC (Cost Only) CLIN.

[Save] [Cancel]

Figure 51: PR – New CLIN – Short Description

Priced CLINs will instead be routed directly to the edit details screen.

Figure 52: PR – New CLIN – Priced CLIN Details

For Informational CLINs, SeaPort provides the first Sub-Contract Line Item Number (SLIN) automatically. SLIN detail can be added by clicking on the edit icon 📝, which will bring up the detail screen seen in Figure 52. Additional SLINs may be added by choosing the *Add SLIN* button 📇 and entering the appropriate information.

3.2.4.2   Edit SLIN Details

A SLIN is a sub line item number. Informational CLINs are comprised of SLINs. In SeaPort-e, SLINs are added either by creating an Informational CLIN, or by clicking on the *Add SLIN* 📇 button within an existing CLIN.

Under the MACs most task orders will have numerous SLINs. This is driven by two things:

1.   Unlike most existing NAVSEA service contracts that have a separate CLIN for each year's requirements, each CLIN of the MACs extends for five years of performance. To create annual options, it will be necessary to create separate SLINs. For example, a base period plus two option periods will require three SLINs:

> 0002AA Base Year
>
> 0002AB First Option Year
>
> 0002AC Second Option Year

NOTE: While a CLIN can last for five years, rules regarding availability of funds for obligation and expenditure still govern how the period of performance for a specific SLIN is structured (e.g., O&M,N expires at the end of the fiscal year)

2. The rule regarding only having one line of accounting for each SLIN still applies. So to accommodate the use of different funds, it will be necessary to use different SLINs.
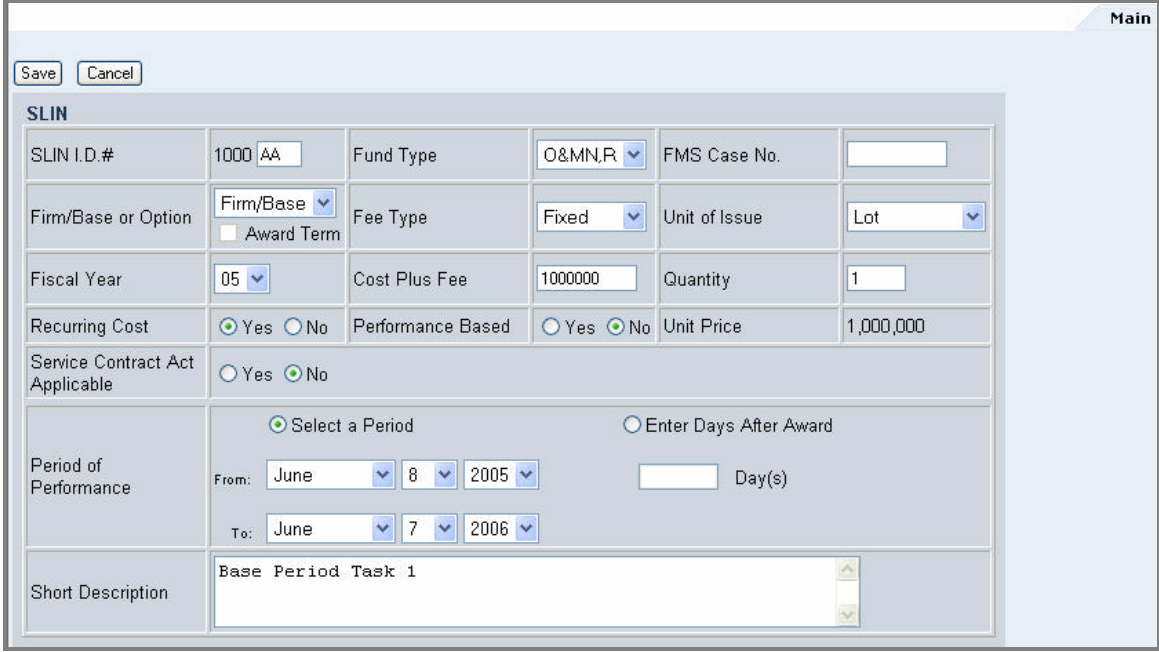
Selecting the *Add SLIN* 🗐 icon on the CLIN line opens the New SLIN page.

The image in Figure 53 below shows the SLIN Details page. A separate SLIN is required for each appropriation type of fund, each fiscal year, and each option.

NOTE: When adding the first Cost Type CLIN, the system can automatically add the first Cost Type SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.

3.2.4.2.1   Main

The Main tab allows the user to edit information that was entered when the SLIN was created

Figure 53: PR – Edit SLIN Details (Cost Type) – Main

3.2.4.3   Pricing Line Item Wizard

The Pricing Line Item Wizard allows a SeaPort-I user to create even a large pricing structure very quickly. This is because the system can automatically generate associated option SLINs without the user having to tediously generate each one individually. Start the Pricing Line Item Wizard by selecting the *CLIN/SLIN Wizard* button from the Pricing Structure Panel.

The first page of the Wizard allows you to enter Period of Performance data for the base period of the task. The user can either directly edit the text box or select a date from the date control by clicking on the calendar icon 🗓 located to the right of the text box.

NOTE: Clicking on the calendar icon opens the calendar utility explained in section 3.2.1.1 above.

NOTE: The *Date From* field automatically defaults to a date that is two weeks from today's date. The default period is one year.
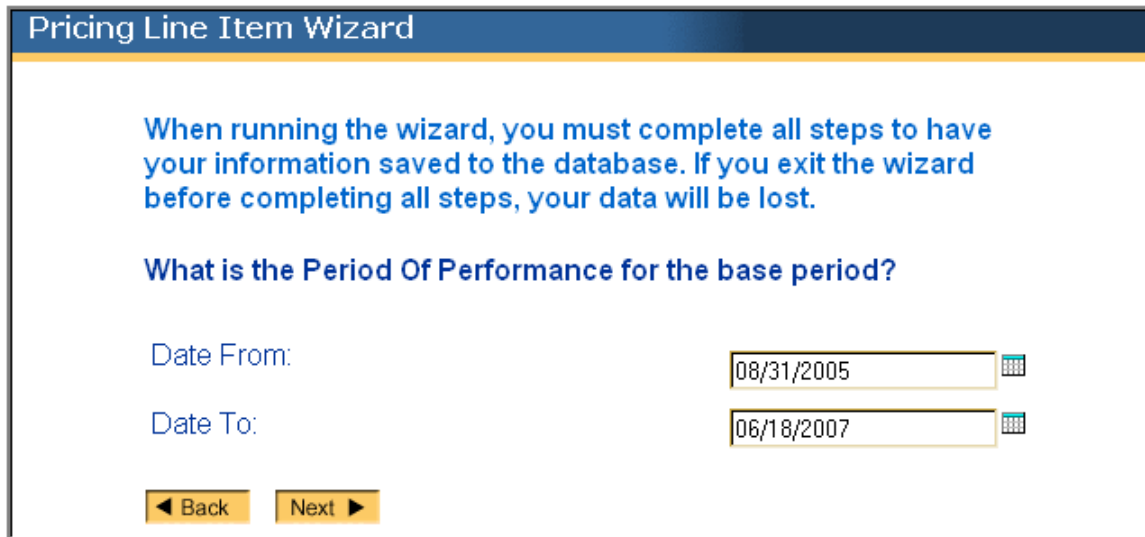
Figure 54: PR – Pricing Line Item Wizard – Period of Performance

The next page of the Wizard allows you to choose a line item type for the base period. Depending on your choice here, one of the following 4 pages will be displayed: Cost Plus Fixed Fee, Cost Plus Award Fee, Cost Plus Incentive Fee, Firm Fixed Price. Should you wish to create more than one type of CLIN, you can do so later. After creating the first CLIN, the system will ask if you wish to create another CLIN. At this point, you will be brought back to this same page in order to create the subsequent CLIN.
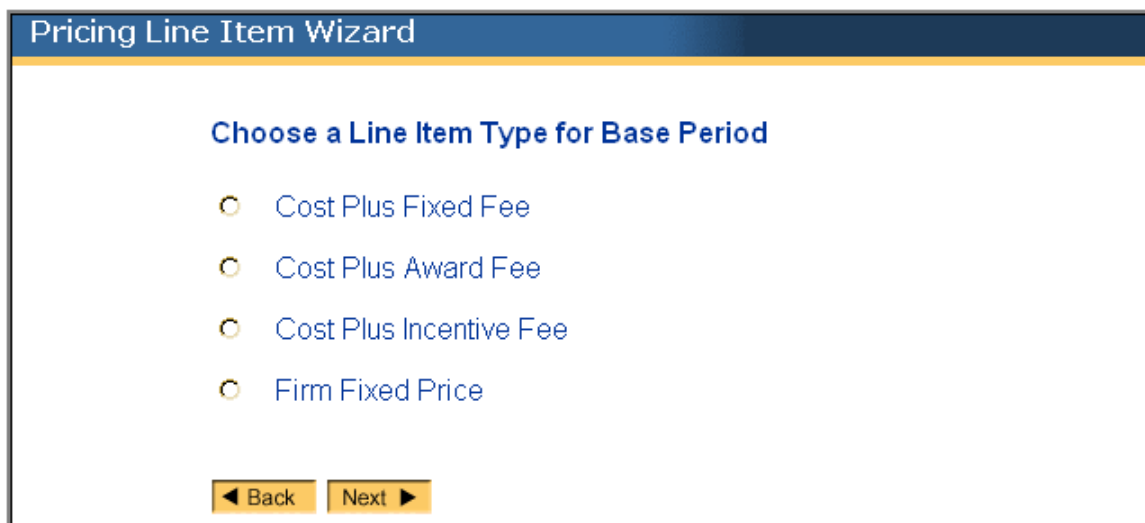
Figure 55: PR – Pricing Line Item Wizard – Line Item Type

The next page asks the user to select the checkboxes of all fund types that will be used on the procurement. The fund types are chosen from the table below.

> **NOTE:** If you wish to add a fund type that does not appear on the list, you should contact your SeaPort administrator or choose OTHER.

Pick All That Apply	Fund Type
☐	FMS
☐	OPN
☐	O&MN,N
☐	O&MN,R
☐	PANMC
☐	RDT&E
☐	SCN
☐	WPN
☐	OTHER
☐	TBD
☐	MDA
☐	NDSF
☐	PMC
☐	WCF

Figure 56: PR – Pricing Line Item Wizard – Fund Type

The next page of the Wizard allows you to enter detailed CLIN/SLIN information. The fund types chosen in the previous page of the wizard appear in the Fund Type dropdown list at the top of this Wizard page. After making the selections on this page, the Pricing Structure panel of the PR will be populated with the CLINS and SLINS.

> **NOTE:** Sometimes it is easier to enter all the CLINs and SLINs using the Wizard and then delete any CLINs or SLINs that you don't need. You may wish to delete a SLIN, for example, if there are ODCs in the first two years, but not in the other years.

Figure 57: PR – Pricing Line Item Wizard – CLIN Details

The next page of the Wizard allows you to create another CLIN.
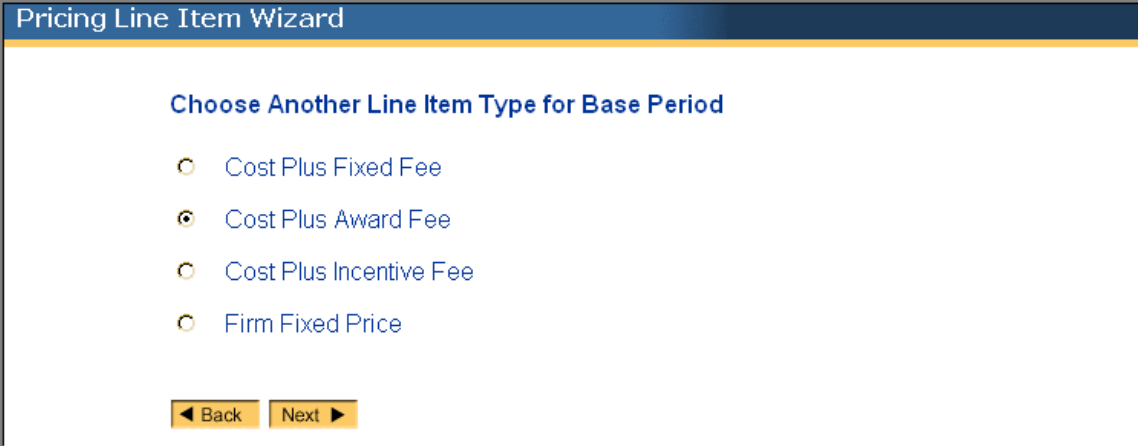
Figure 58: PR – Pricing Line Item Wizard – Create Another CLIN
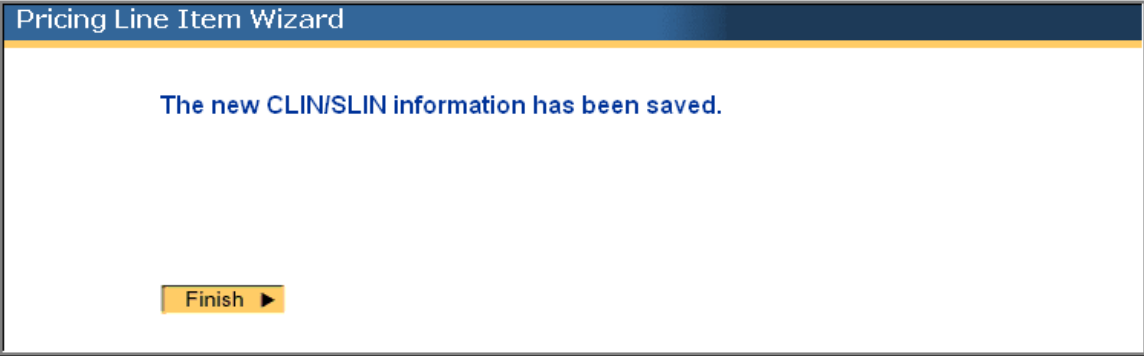
Choosing *Yes* takes you to the Choose Another Line Item Type page where the process can begin again.

Figure 59: PR – Pricing Line Item Wizard – Another Line Item Type

Choosing *No* takes you to the Finish page.

Figure 60: PR – Pricing Line Item Wizard – CLIN/SLIN Save Confirmation

Selecting the *Finish* button here returns you to the Pricing Structure panel with the CLIN/SLIN information (entered using the Wizard) filled in and expanded.

> **NOTE:** You must complete the Pricing Line Item Wizard by selecting the *Finish* button in order to save your work. If you close the Wizard before completing this step, your work will be lost.

Cost Type CLINs will automatically create a SLIN.

On the Pricing Structure page, the list of CLINs and SLINs is expanded by default unless there are a large number of CLINs and SLINs. Some Task Orders may have over 200 SLINs. In this case, you may choose to only view the SLINs that you are currently working with. Deselecting the checkbox next to the CLIN ID of the CLINs you don't want to see and then selecting the *Expand CLINs* button will reload the page with only the checked CLINs expanded. This can reduce the scrolling necessary to see all of the pertinent information.

At this point you may choose to edit a SLIN to add additional information. Selecting the edit icon ✎ will open the SLIN window described in section 3.2.4.2 above.

Figure 61: PR – Pricing Structure

3.2.4.4   Timeline

The *Timeline* button is explained under Solicitation Document in Section 4 of this training.

3.2.5   Add Requirements data

The Requirements Panel contains all the information about the actual contractor effort required. The Requirements Panel consists of a list of links (noted in blue text). Blank icons reveal sections with no data entered. Filled icons reveal sections with existing data. Table 19 below details the sections available on the Requirements page.

Table 19: PR Requirements Panel – Fields

Field	Type	Description
Comments	Link	The PR Wizard may generate some comments. Enter additional comments here.
Section C Statement of Work	Link	The SOW must be cut-and-pasted or manually entered via the Requirements data entry screen. Do not use the attachment feature to attach the SOW.
		The statement of work (SOW) should specify in clear, understandable terms the services to be performed by the contractor. Preparation of an effective SOW requires both an understanding of the services that are needed to satisfy a particular requirement and an ability to define what is required in specific, quantitative terms. A SOW prepared in explicit terms will enable offerors to clearly understand the Government's needs. A well-written SOW facilitates the preparation of responsive proposals and the delivery of the required services. A well-written SOW also aids the Government in source selection and contract administration after award.
Section D Packaging and Marking		Packaging and Marking defaults to best commercial standards. If a user opts for special instructions, information must be entered into the text box describing what those special requirements are.
Reports	Link	Reports are comparable to Contract Requirement Deliverables List (CDRL) deliverables. This box defaults to the seven most common reports required under service contracts. This list of reports can be tailored and reports can be deleted and/or added based on the specific requirements of this task order. The Proposed Performance Based Statement of Work for Out-years report should be deliverable 90 days prior to end of first years period of performance and revisions would be as required.
Award Term Clause	Link	Enter Award Term Clause here.
		Note: The Award Term Clause link may not be visible depending on the choices made when the PR was created. If you wish to include an Award Term Clause and the link is not listed here, use the left navigation to go to the Procurement Panel and select *Yes* to the Award Term Consideration question (last question on the page). After selecting *Yes*, the link will appear when you return to the Requirements Panel.

Field	Type	Description
Award Term Plan	Link	Enter Award Term Plan here.
		Note: The Award Term Plan link may not be visible depending on the choices made when the PR was created. If you wish to include an Award Term Plan and the link is not listed here, use the left navigation to go to the Procurement Panel and select *Yes* to the Award Term Consideration question (last question on the page). After selecting *Yes*, the link will appear when you return to the Requirements Panel.
Proposal Requirements and Evaluation Criteria	Link	Enter Proposal Requirements and Evaluation Criteria here.
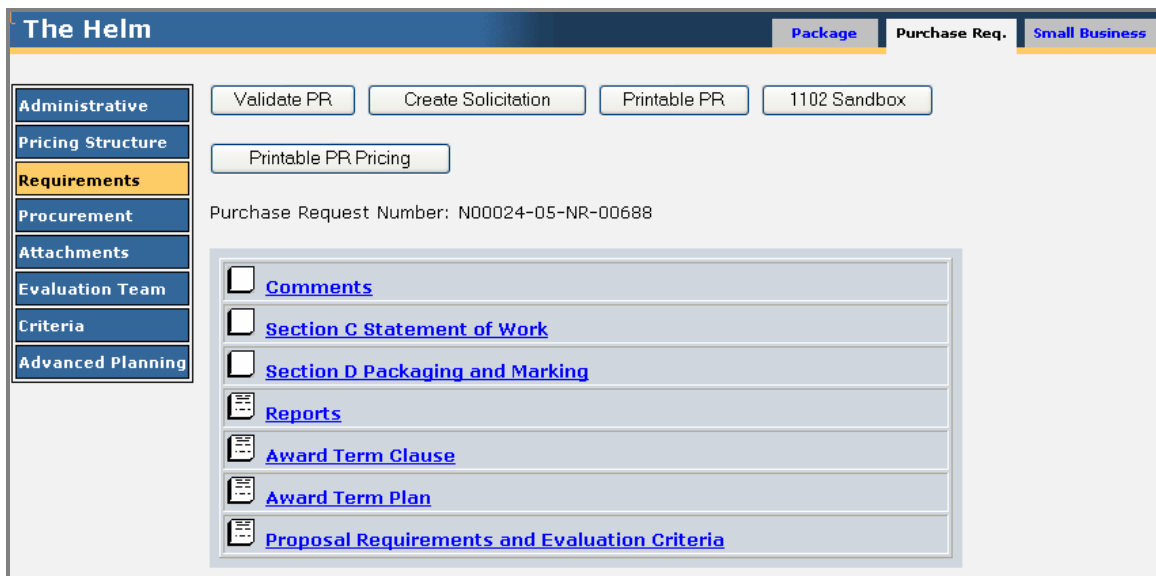
Figure 62: PR – Requirements List

3.2.5.1   Requirements Detail

Each requirement in the list is represented by a link. Selecting any of these links will bring up a Requirements Details window in which to enter the actual text of the requirement. An example of such a window is found in Figure 63. The Requirements listed at the PR stage in the procurement cycle are a subset of the total Requirements. The next stage of the procurement cycle, Solicitation Document, will contain all of the Requirements.

Table 20 and Table 21 below detail the fields and buttons contained on the entry forms.

> **NOTE:**   Typing into an area that is auto filled can result in your typed text being overwritten by the template text.

Table 20: PR Requirements Detail – Fields

Field	Type	Description

Field	Type	Description
Text Entry	Text Box	Enter the text of the Requirement.
[[--preformatted-On--]]	Command	"Typewriter" mode. Each space and carriage return in the textbox appears verbatim in the PDF. Lines do not wrap. This is how to preserve your line-breaks and alignment onscreen and in the PDF. Use this technique for addresses, poetry, tabular text, etc.
[[--preformatted-Off--]]	Command	Resume "wrapping" long lines to form paragraphs. Normal text. Press Enter at the end of each paragraph.
[[--table--]]	Command	The following lines constitute a table, with a Tab between cells. To add a column insert a Tab into each row. **Note:** In the PDF, every table occupies the full width of the page.
Commercial/Special	Radio	Choose Commercial or Special. **Note:** Only available in Section D Packaging and Marking.

Table 21: PR Requirements Detail – Buttons

Button	Description
Save	Saves the text in the text area.
Save & Close	Saves the text in the text area and closes the window.
Preview	Brings up another window that displays the text as it will appear in the PDF document. (This is especially useful when using the formatting commands)
Pin...	Brings up a window where the system's automatic fill-ins (e.g., number of hours, SLINs are fully-funded, etc., etc.) are marked with a checkbox. If you need to "freeze" any of those substitutions so it becomes plain text and ceases to automatically update, checkmark it and press Save. Fill-ins that you leave unchecked will continue to update automatically.
Help	Brings up the Help system in a separate window. The Help system here contains details and examples to assist in using the formatting commands listed in Table 20 above.
Cancel	Closes the window without saving changes.
View Templates	Represented by the icon. Opens a pop up window that contains all available templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them.
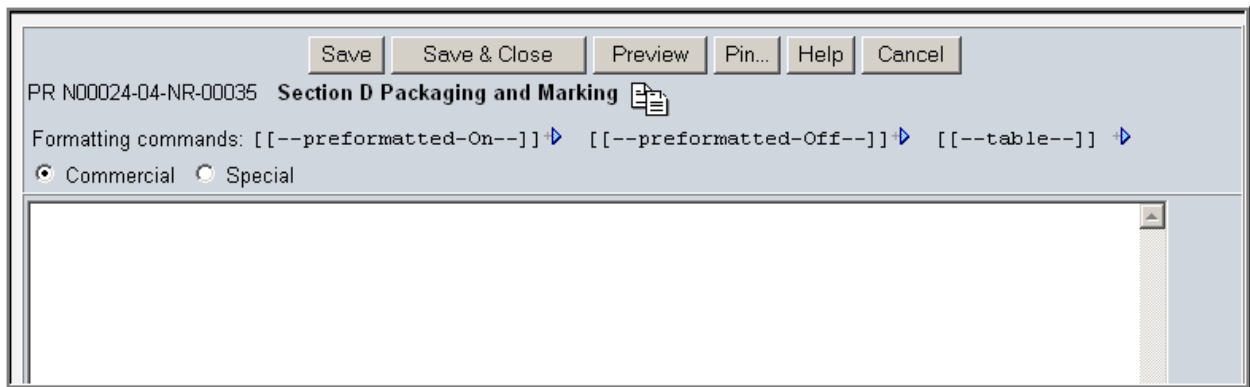
Figure 63: PR – Requirements Detail

3.2.5.2 Requirements Templates

Selecting the templates icon![icon] opens a pop up window that contains all of the SeaPort templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them. After selecting the templates icon from the Requirements Details page, a window will appear where the user can choose a template. An example of this window is represented in Figure 64 below. Different Requirements will have different templates available (or no templates at all), but the procedure for choosing a template is the same.
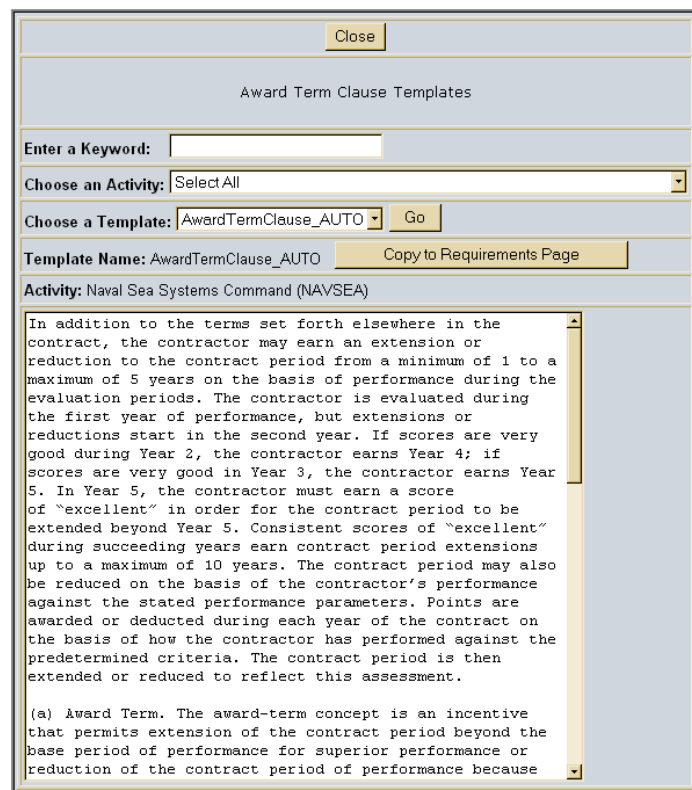
Table 22and Table 23 below detail the fields and buttons contained on template page.

Table 22: PR Template Page – Fields

Field	Type	Description
Enter a Keyword	Text Box	A keyword can be any search term that is contained in the text of the template. Entering a keyword and selecting *Go* will list only those templates that contain that keyword.
Choose an Activity	Dropdown	Choose an Activity from the dropdown list. Choosing an Activity and selecting *Go* will list only those templates that are part of that Activity.
Choose a Template	Dropdown	Choose a template from the dropdown list. Choosing a template and selecting *Go* will display the template text in the textbox below.
Template Name	Read Only	System-generated based on the selected template.
Activity	Read Only	System-generated based on the selected template.
Template Text	Text Box	This is the actual text of the selected template. You can read the text of any template here before you choose to include it in your requirement. **Note:** You will have the opportunity to edit the template text after it is copied into the requirement.

Table 23: PR Template Page – Buttons

Button	Description
Close	Closes the Templates window.
Go	Searches the SeaPort templates repository for a template that matches the selected criteria.
Copy to Requirements Page	Copies the text displayed in the Template Text Box to the Requirement.

Figure 64: PR – Requirements Template

3.2.5.3 Importing text from Microsoft Word

Requirements text may be imported from Microsoft Word or any other word processing program. Below are some hints for successfully importing text from Microsoft Word. These hints may or may not apply to other word processing software.

Follow these steps:

Step 1.   Locate each table in the Word document. Right above the table, put the following command: [[--table--]]

Step 2.   Locate each place where Seaport must refrain from forming paragraphs.

Before each such place, put the command [[--preformatted-On--]]

After each such place, put the command [[--preformatted-Off--]]

Step 3. For each bullet list, choose whether it should come into Seaport as (a) paragraphs or (b) a preformatted section.

If you take no special action, each bullet point will be a paragraph on its own.

You can achieve a more compact result (if the bullet points are short) by using Preformatted mode for the bullet list.

Step 4. Select the text in the Word document.

Step 5. Paste it into Seaport.

NOTE: You may paste into Seaport first, and then put in the command lines. But you may feel you get a better view of what's going on, using Word for those steps.

3.2.6   Add Procurement data

The Procurement Panel is the area of the PR section in which information specific to this acquisition is collected. Most of the information on this screen is automatically populated with the information that was collected during the Wizard, such as the Evaluation Criteria and Type of Procurement. Users must enter the Requested Award Date, the Acquisition Plan Number, Period of Performance dates, whether a DD254 is Required, and Award Term Consideration. If you elect to incorporate award term incentives, the Award Term Clause and Plan are automatically populated with language that is common to similar service contracts with Award Terms.

Table 24: PR Procurement Panel – Fields

Field	Type	Description
Requested Award Date	Dropdown	Enter the Requested Award Date using the dropdown lists.
Acquisition Plan No. (If not applicable, enter N/A)	Text	Enter the Acquisition Plan No. Not required.
Period of Performance	Dropdown	Enter the From and To dates of the Period of Performance using the dropdown lists.
Type of Procurement		
Competitive/Sole Source	Radio	Choose Competitive. The Sole Source option has been disabled within SeaPort.
Justification Template		Select the View Templates icon to open the Sole-Source Justification Templates window. Choose a template to paste into the Justification field below.
Prior Task Order No.	Read Only	This field is populated by the system, if applicable.
Prior Solicitation Document No.	Read Only	This field is populated by the system, if applicable.
Purchase Request No.	Read Only	This field is populated by the system.
Evaluation Criteria		

Field	Type	Description
Evaluation Strategy	Radio	The program manger needs to determine if the competition will be evaluated on a best value to the Government basis or on the low cost/technically acceptable basis. If best value is to be used, the importance of the factors (technical, past performance, and price) must be determined. The order of importance of factors is based upon what is in the best interest of the program. These areas should correspond with and relate to the specific requirements set forth in the Statement of Work. Choose Best Value of Low Cost.
Technical	Dropdown	For Best Value, select importance of the Technical evaluation criteria. Choose First, Second, Third, or Even.
Past Performance	Dropdown	For Best Value, select importance of the Past Performance evaluation criteria. Choose First, Second, Third, or Even.
Price	Dropdown	For Best Value, select importance of the Price evaluation criteria. Choose First, Second, Third, or Even.
DD254 Required	Radio	Whether elements of Task Order involve the need to access classified documents, see the SSAPO website for procedures. Choose Yes or No.
Award Term Consideration	Radio	Award Term clauses provide a mechanism for the Government to allow contractors to earn additional options to extend the term of the contract through exceptional performance. For additional information on award term contracts see SSAPO website. Choose Yes or No. **Note:** If Yes, enter the clause and plan on the Requirements page. These clauses are shown in Table 19 above.

Figure 65: PR – Procurement

3.2.7   Add Attachments data

Users are able to attach any electronic files to the PR that may apply. For example, drawings, specifications, organizational structures, or background information may all be attached at the Attachments Panel. Attachments that are added here are imported and put into the Bid Event when the Solicitation is released.

To add a new attachment, the user should select the *New* button. By selecting *Browse* on the following screen, the user is able to browse through their files, either locally, a network, or on desk, using a browser. Upon finding the file you wish to attach, double click on the file or select the file and click *Open*. Enter a description, e.g, "Milestone Timeline" in the text box. Clicking the *Save* button returns the user to the main Attachments screen. Under the Actions column, the user can click the edit icon ✎ to edit the Purpose text or the trashcan icon 🗑 to delete an attachment.

> **NOTE:**   In order to update an attachment that has already been added, you can delete the original and then upload the newer version of the file.

The Attachments panel is used to add attachments to the Purchase Order. It contains the following data fields and buttons.

Table 25: PR Attachments Panel – Fields

Field	Type	Description
Filename	Link	The attachment's filename. Selecting this link will download the attachment. You will be prompted to either save or open the attachment depending on the attachment type.
Purpose	Read Only	The Purpose text that was entered when the attachment was saved. The Purpose text can be edited by selecting the Edit icon described below.

Table 26: PR Attachments Panel – Buttons

Button	Description
Delete All	Delete All attachments in the list.
New	Add a new attachment.
Edit	Represented by the icon ✐, the attachment's Purpose text can be edited.
Delete	Represented by the icon 🗑, the attachment can be deleted.
Save	Save the attachment and return to the Attachments panel.
Cancel	Return to the Attachments panel without saving the attachment.
Browse	Browse your computer, network resources, or removable media for a file.

Figure 66: PR – Attachments – No Attachments

Figure 67: PR – Attachments – With Attachments

Figure 68: PR – Attachments – Add Attachment

3.2.8   Add Evaluation Team data

Evaluator data can be added using the User Search feature (described in section 3.2.1.3 above).

Only the Originator of a Purchase Request (PR) or Solicitation Document (SD) editor or the PCO can assign, remove, or change the chairman or members of the evaluation committee.

The Originator and PR editor perform their functions from the PR document screen; the PCO and SD editor perform these actions from the Solicitation Document screen. Regardless of the screen set used, to get started click the *Evaluation Team* button found in the left navigation area and follow these procedures:

Table 27: PR Evaluation Team Panel – Fields

Field	Type	Description

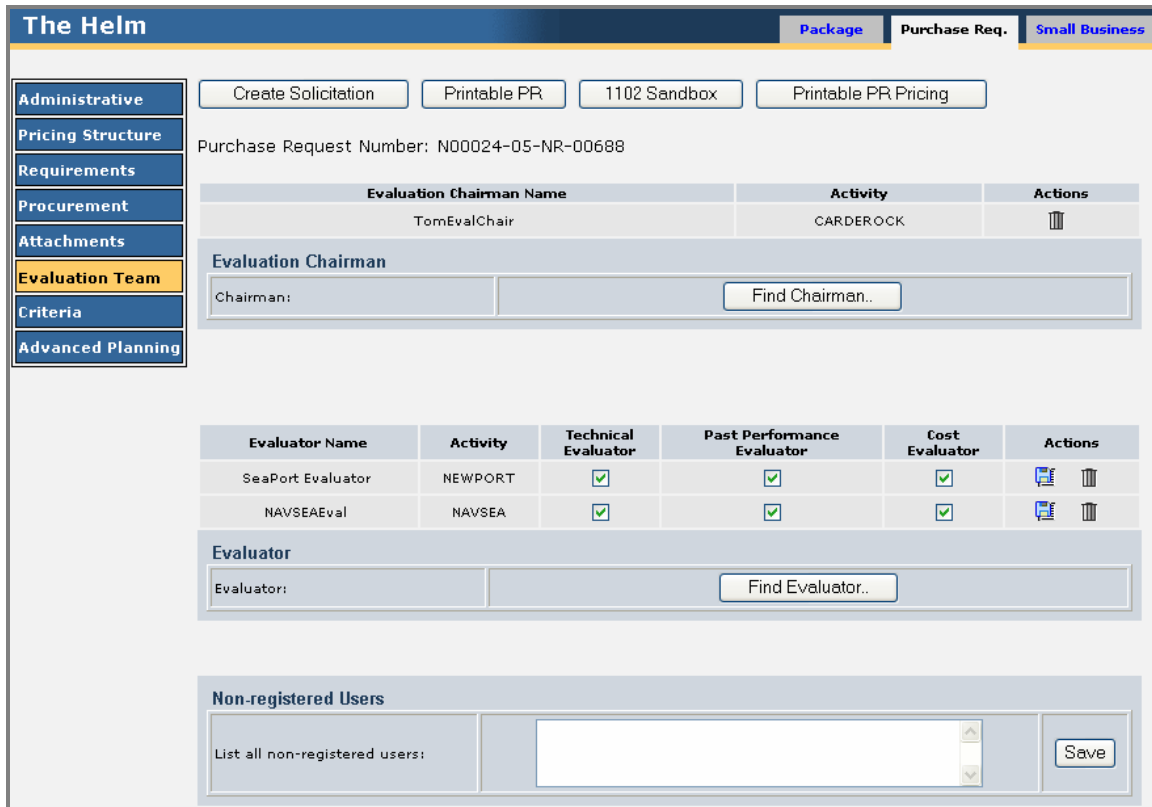| Field	Type	Description
Evaluation Chairman	User Search	Use the User Search feature (described in section 3.2.1.3 above) to add the Evaluation Chairman name. Only one evaluation chairman can be assigned to an evaluation committee. The document originator or the PCO can assign the chairman. If it is desired that a Chairman submit his individual evaluation beside the summary evaluation, the chairman needs to be chosen as an evaluator as well.

Evaluator	User Search	Use the User Search feature (described in section 3.2.1.3 above) to add Evaluators. Evaluators are those individuals who will evaluate the proposals once they are received. They should have expertise in one of the evaluated areas such as technical requirement or past performance. A registered evaluator is a person who already has a SeaPort account (i.e., a user id and password). There is no limit to the number of evaluators that can be assigned to an evaluation committee. When making workload assignments, an evaluator can be assigned to rate any or all of the following evaluation categories:
		    ■ Technical
		    ■ Past Performance
		    ■ Cost

Non-registered users	Text Box	A non-registered evaluator is a person who does not already have a SeaPort account. Manually enter the name of any evaluators that do not have SeaPort accounts. A text box is provided to record the name and assignments of those individuals. It is then up to the chairman or the PCO to notify those individuals to register. Non-registered evaluators must be given a SeaPort account before they can access the evaluation system.
Technical Evaluator	Checkbox	Choose this checkbox to designate this person as a Technical Evaluator. **Note:** Only a Cost Evaluator will see cost information.
Past Performance Evaluator	Checkbox	Choose this checkbox to designate this person as a Past Performance Evaluator. **Note:** Only a Cost Evaluator will see cost information.
Cost Evaluator	Checkbox	Choose this checkbox to designate this person as a Cost Evaluator. **Note:** Only a Cost Evaluator will see cost information.

Table 28: PR Evaluation Team Panel – Buttons

Button	Description
Find Chairman	Activate the User Search feature (described in section 3.2.1.3 above).
Find Evaluator	Activate the User Search feature (described in section 3.2.1.3 above).
Save	Save the list of Non-registered users.
Delete	Delete an evaluator from the list.

Figure 69: PR – Evaluation Team

3.2.9   Add Criteria data

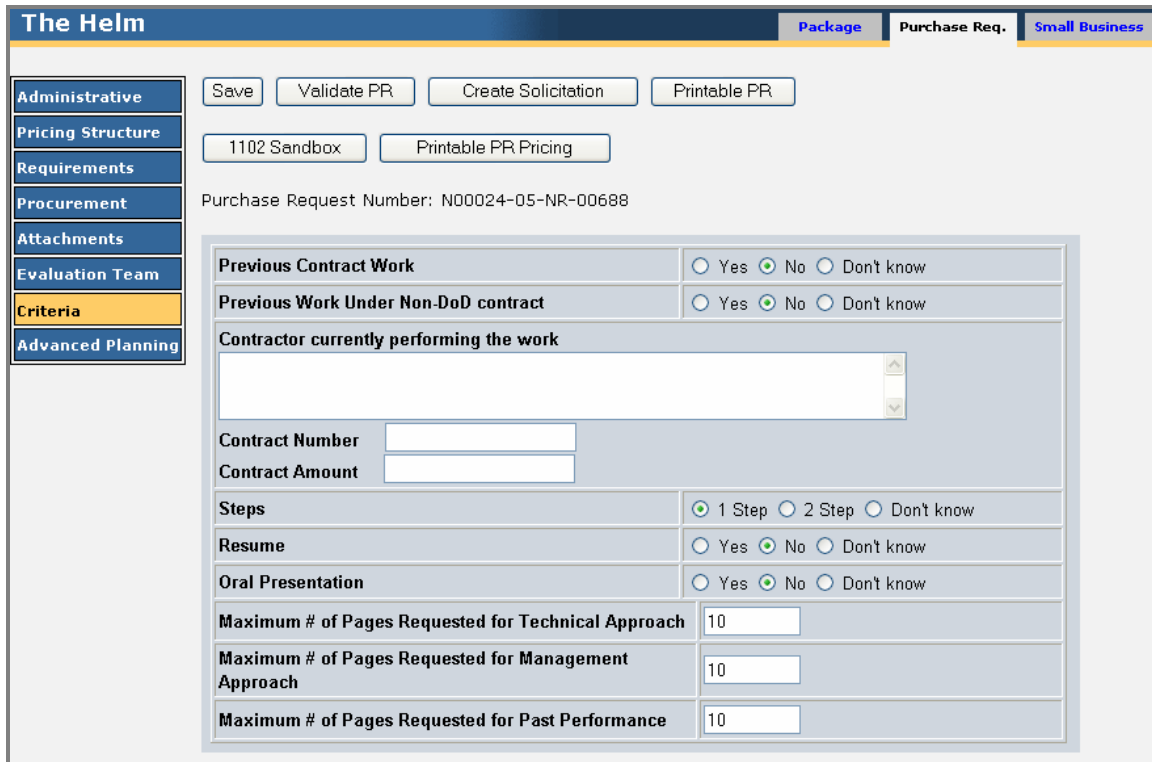Criteria data is information that relates to the submission and review of proposals.

Table 29: PR Criteria Panel – Fields

Field	Type	Description
Previous Contract Work	Radio	Was work done under a previous contract number? Choose Yes, No, or Don't Know.
Previous Work Under Non-DoD contract	Radio	Was previous work done under a Non-D0D contract? Choose Yes, No, or Don't Know.

Field	Type	Description
Contractor currently performing the work	Text Box	The name of the contractor(s) currently performing work on this contract, if applicable.
Contract Number	Text Box	The previous contract number, if applicable.
Contract Amount	Text Box	The previous contract amount, if applicable.
Steps	Radio	Will this be a one step or a 2 step process? Choose 1 Step, 2 Step or Don't Know. **One Step Process** Under a one step source selection process, bidders submit their proposals based on the solicitation. The proposals are evaluated and award is made. **Two Step Process** Under the first step of a two step source selection process, interested offerors are asked to submit a one or two page approach summarizing their technical experience and their past performance, as well as a "not-to exceed" (NTE) price. The submittals are evaluated and the top offerors are asked to participate in the second step of the process. The offerors that have been selected to submit proposals for the second step will explain in greater detail the ideas that they submitted in the first step. The SeaPort office can help the program manager decide whether a two step source selection process is appropriate.
Resume	Radio	You can choose whether or not to receive resumes from those individuals who would be performing the service. Will resumes be required as part of the award determination process? Choose Yes, No, or Don't Know.
Oral Presentation	Radio	If you select to have oral presentations, you need to decide how long the presentations will be. You can also choose to receive written overviews to review. Will oral presentations be required as part of the award determination process? Choose Yes, No, or Don't Know.
Maximum # of Pages Requested for Technical Approach	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their Technical Approach. Enter the maximum number of pages requested for the Technical Approach document, if applicable.
Maximum # of Pages Requested for Management Approach	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their Management Approach. Enter the maximum number of pages requested for the Management Approach document, if applicable.

Field	Type	Description
Maximum # of Pages Requested for Past Performance	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their Experience Statement. Enter the maximum number of pages requested for the Past Performance document, if applicable.

Figure 70: PR – Criteria

3.2.10   Add Advanced Planning data

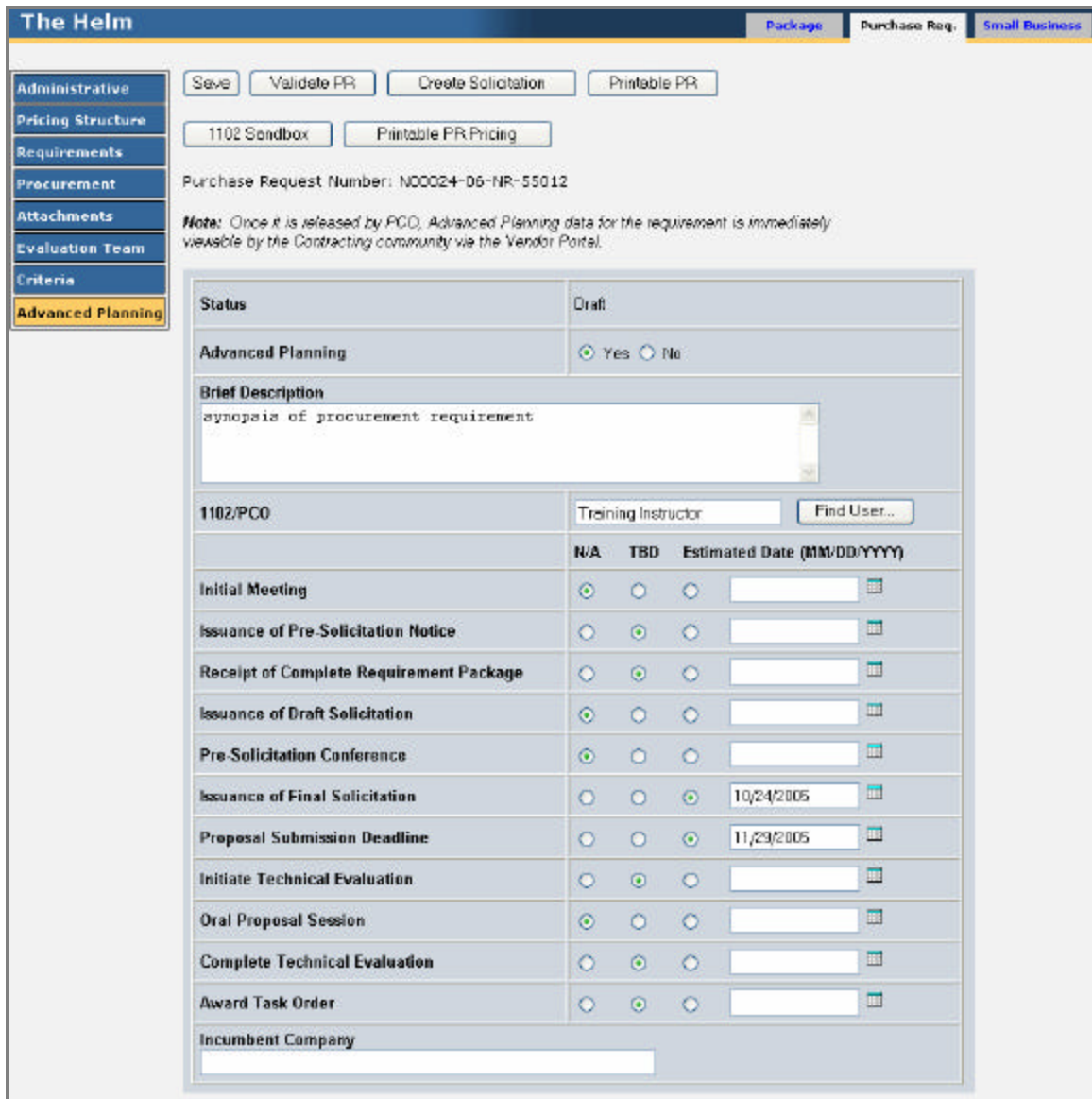The Advanced Planning provides estimated target dates for various milestones in the acquisition lifecycle.

Table 30: SD Advanced Planning – Fields

Field	Type	Description
Advanced Planning	Radio	Indicate whether or not to provided Advanced Planning notice. Choose Yes or No.
Brief Description	Text Box	Provide a synopsis of the procurement effort.
1102/PCO	User Search	Use the User Search feature (described in section 3.2.1.3 above) to add the 1102 or PCO name who will serve as a point-of-contact.

Field	Type	Description
Initial Meeting	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Issuance of Pre-Solicitation Notice	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Receipt of Complete Requirement Package	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Issuance of Draft Solicitation	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Pre-Solicitation Conference	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Issuance of Final Solicitation	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Proposal Submission Deadline	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Initiate Technical Evaluation	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Oral Proposal Session	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Complete Technical Evaluation	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Award Task Order	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Incumbent Company	Text Box	Indicate who the incumbent company is.

Table 31: PR Advanced Planning Panel – Buttons

Button	Description
Release Planning	Allows the user to release the specified advanced planning dates to the vendor community. Only PCOs will have access to the Release Planning button.

Figure 71: PR – Advanced Planning

A PCO can create a draft solicitation by pressing the *Create Solicitation* button.

Once pressed, the system runs a validation routine to ensure that the draft PR has all required fields populated. If true, the system will successfully validate and create the draft solicitation. If the validation fails, the system reports the errors requiring attention via a message box.

Upon successful validation the system generates a draft solicitation, provides a unique solicitation number, and populates most of the solicitation fields with the data from the PR.

3.2.11   Small Business Set Aside

Use the Small Business tab at the top of the screen to access this panel. Saving the Small Business Set Aside selection will allow the Solicitation to be released. Choose a PCO Set Aside Selection and enter a Justification if necessary. Save the Selection or Save and Invite the DSB (Deputy for Small Business) by choosing the appropriate button. Selecting the *Save and Invite DSB* button will send an e-mail to the DSB. The DSB will complete the DSB Set Aside Selection section. The document doesn't have to be in the DSB mailbox to be reviewed. The Small Business Set Aside panel contains the following fields:

Table 32: PR Small Business Set Aside Panel – Fields

Field	Type	Description
Section C	Link	This link opens the Section C (Statement of Work) for this PR in a separate window.
Proposal Requirements and Evaluation Criteria	Link	This link opens the Proposal Requirements and Evaluation Criteria for this PR in a separate window.
Subcontracting Plan Required	Radio	Choose *Yes* or *No.*
Previous Acquisition	Check Box	Check all that apply.
Recommended Sources	Text Box	Enter Recommended Sources here in plain text.
PCO Set Aside Selection	Dropdown	Choose *No, Full Set Aside*, *Protected 8(a), Protected SDVOSB, Protected HUBZone, or Cascade*. If *No* is selected, a Justification is required.
Justification (PCO)	Text Box	Enter the justification for selecting *No* Set side Selection. Required if *No* is selected above.
DSB Set Aside Selection	Dropdown	Choose *No, Full Set Aside*, *Protected 8(a), Protected SDVOSB, Protected HUBZone, or Cascade*. If *No* is selected, a Justification is required.
Justification (DSB)	Text Box	Enter the justification for selecting *No* Set side Selection. Required if *No* is selected above.

Table 33: PR Small Business Set Aside Panel – Buttons

Button	Description
Save Selection	Save changes to the database.
Save and Invite DSB	Save changes and also invite the DSB to make Set Aside selections.
Printable Review	Loads a printable (reduced graphics) version of the page in a separate browser window

Figure 72: PR – Small Business – Set Aside

4   Solicitation Document

This section details the Solicitation Document training session. The Solicitation Document training session follows the structure outlined in the *SeaPort II Training Plan*, Section 3.1: Training Methodology, and contains the key concepts outlined in Section 5: Training Curriculum.

4.1   Explain

The purpose of the Solicitation Document panels is to consolidate information entered in the Purchase Request with contractual information that will eventually be sent out to the Contractors for bidding. Use the left navigation buttons to access all the related Solicitation Document panels.

The Solicitation Document organizes the Purchase Request (PR) data into a solicitation format. After the Originator routes a PR to a SEA 02 contracting officer for processing, they will be able to view but no longer be able to manipulate any of the information. These functions transfer to SEA 02.

Once the Solicitation Document is complete, the PCO will "Lock & Release" the solicitation. SeaPort archives and posts this document as the official solicitation of record and permits no further changes. SeaPort notifies all MAC holders that the solicitation has been posted.

Any changes to a released solicitation require issuance of a Solicitation Amendment.

4.2   Demonstrate

During the draft solicitation state, the PCO/1102 is required to populate several fields not entered during the PR stage. Data that was entered into the PR is reflected in the Solicitation Document. The following sections describe the solicitation panels and individual fields.

4.2.1   Add Administrative data

The Administrative panel is used to enter Administrative data. It contains the following data fields and buttons.

Table 34: SD Administrative Panel – Fields

Field	Type	Description
PR No.	Read Only	Automatically entered by SeaPort.
Sol. No.	Read Only	Automatically entered by SeaPort.
Amendment No.	Read Only	Automatically entered by SeaPort, if applicable.
Date Issued	Dropdown	Enter the Date Issued using the dropdown lists.
Closing Date	Dropdown	Enter the Closing Date using the dropdown lists.
Closing Time	Text Box	Use HHMM format. All times should be entered using military time based upon your local time. If a closing date is entered, a closing time is required.
Requesting Office		
Organization	Dropdown	Select the Organization.

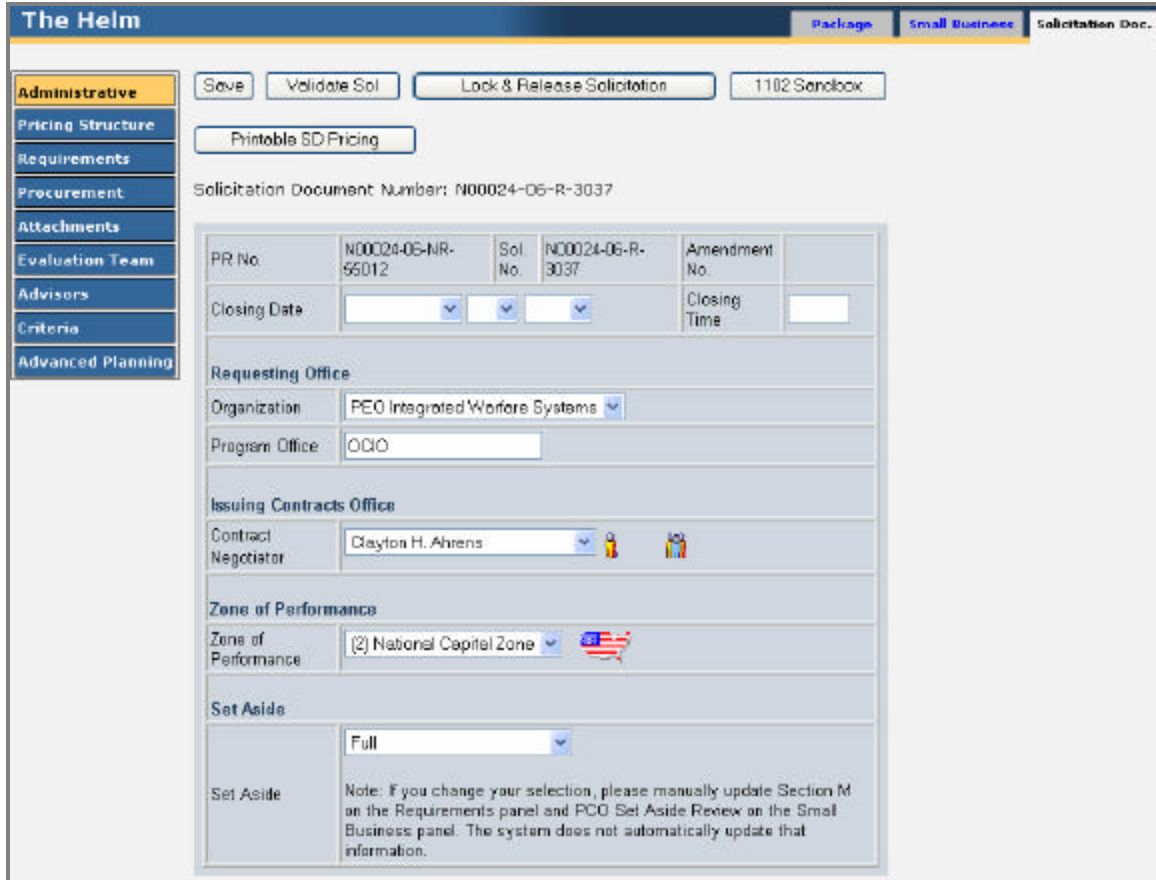| Field	Type	Description
Program Office	Text box	Enter the program office name/number, if applicable.
Issuing Contracts Office		
Contract Negotiator	Dropdown	Select a Contract Negotiator from the dropdown list.
View All		View a list of all Negotiators in the system. This list opens in a pop-up window.
User Information		View the SeaPort Profile of the selected user.
Zone of Performance	Dropdown	Choose a zone of performance from the dropdown list. Zones can be displayed by selecting the map icon.
Display Zone Map		Displays a geographical color-coded zone map in a pop up window. The zone map is shown in Figure 26 above.
Set Aside	Dropdown	Set Aside will be the attribute of the package and can be changed through the Purchase Request/Solicitation stages of the package until the Solicitation is released. Choose No, Full Set Aside, Protected 8(a), Protected SDVOSB, Protected HUBZone, or Cascade. If user selects one of the Set Aside options, Section M will be automatically populated with the appropriate Set Aside clause. If user selects "Cascade", Section M will be automatically populated with Cascading Set Aside clause. If user selects "No", no Set Aside provisions are automatically inserted in to Section M. **Note:** If the original selection is changed, the user must manually update Section M on the Requirements panel and PCO Set Aside Review on the Small Business panel. The system does not automatically update that information.

Table 35: SD Administrative Panel – Buttons

Button	Description
Save	Pressing this button updates information in the database. **Note:** Data is automatically saved when using the left navigation.
Validate Sol	Pressing this button ensures that all required fields have been entered. If all required fields have not been entered, the system notifies user of an error condition. This notification is in the form of a message window indicating the missing fields.
Lock & Release Solicitation	Pressing this button will create a final version of the Adobe PDF file with the word "Final" appearing at the top of each page and lock/protect all Solicitation Document fields from further update. Press this button when the document is complete and ready to opened up for bidding.
1102 Sandbox	Pressing this button opens a new browser window containing a form that can be used to store temporary 1102 information.
Printable SD Pricing	Pressing this button opens a new browser window containing a printable version of the Solicitation Document's pricing structure.

NOTE: The Save, Validate Sol, Lock & Release Solicitation, 1102 Sandbox, and Printable SD Pricing buttons are common to several of the SD panels. They always perform the same function.

Figure 73: SD – Administrative

4.2.2 Add Pricing Structure data

The purpose of the Pricing Structure Panel is to lay out the Contract Line Item Number (CLIN) structure of the Task Order. The basic MAC contracts have within them a uniform CLIN structure based upon contract type. The Solicitation Document Pricing Structure panel replicates this structure. Information such as Total Duration and Estimated Total Cost will be provided by the Wizard. It contains the following data fields and buttons.

Table 36: SD Pricing Structure Panel – Fields

Field	Type	Description
New CLIN Window		
CLIN ID	Text Box	Choose from 0001 – 0009 or 1000-9999 (for SeaPort-e). Each CLIN ID corresponds to a specific cost type and period of performance. See table in Figure 49.

Field	Type	Description
New CLIN Window		
CLIN Category	Radio	Choose whether to add an Informational or Priced CLIN.
Short Description	Text Box	Enter a short description for the CLIN up to 1000 characters.
Automatically create ODC	Check Box	Select this check box to automatically create an ODC CLIN when creating a Cost Type CLIN.
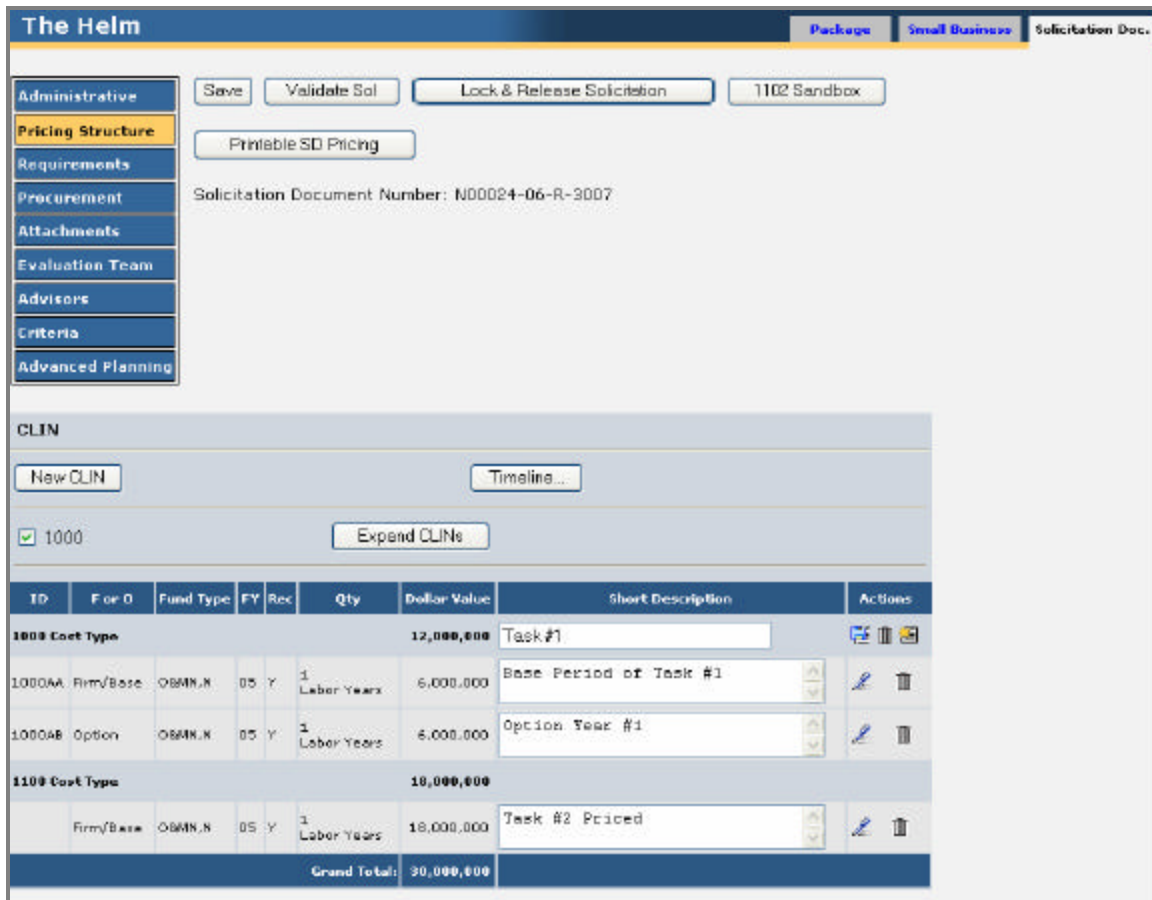
Table 37: SLIN / Priced CLIN Detail - Fields

Field	Type	Description
SLIN ID #	Text Box	Enter a valid 2-letter combination. User should enter SLINs sequentially starting with AA. This field is displayed only for Informational CLINs.
CLIN #	Read Only	Displays the CLIN ID # (this field is displayed only for Priced CLINs)
Fund Type	Dropdown	Choose from the list. See table in Figure 56.
FMS Case Number	Text Box	If FMS funding is used, specify the case. Enter the case number in the format AA-A-AAA.
Firm or Option	Dropdown	Enter whether this requirement will be placed at time of award or if it is a future requirement. Choose Firm or Option.
Fee Type	Dropdown	Choose Fixed, Award, or Incentive.
Unit of Issue	Dropdown	Choose Labor Hours, Lot, or Labor Years.
Fiscal Year	Dropdown	Enter the fiscal year for the money being used. Choose the last 2 digits of the fiscal year from the list.
Cost Plus Fee	Text Box	Originator should enter their best estimate. This is for planning purposes only, but all fields must contain a value. Enter the dollar amount. (14 digit limit)
Quantity	Text Box	If level of effort, your estimate of the number of man-hours required. If completion, enter the numeral 1; unit of issue is "Lot". Enter the quantity. (9 digit limit)
Recurring Cost	Radio	Choose Yes or No.
Performance Based	Radio	Choose Yes or No.
Unit Price/Total Price	Read Only	This field is calculated based on other data.
Service Contract Act Applicable	Radio	Choose Yes or No.
Automatically Create ODC (Cost Only) CLIN	Radio	Choose Yes or No.

Field	Type	Description
Period of Performance	Dropdown	*Select a Period* Enter when performance starts and when performance ends. Choose From and To dates using the dropdown lists.
	Text Box	*Enter Days After Award* Enter the length of the period of performance in days (only available for option SLINs).
Short Description	Text Box	Enter a very short description (e.g., "Logistics Support for SEA 02") that will appear in Section B of the Task Order. Enter up to 1000 characters.

Table 38: SD Pricing Structure Panel – Buttons

Button	Description
New CLIN	Click the *New CLIN* button to add a contract line item number (CLIN). You must also enter categorize the new CLIN as Informational or Priced and supply a short description. When adding the first Informational Cost Type CLIN, the system will automatically add the first Cost Type SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields. When adding a Priced CLIN, you will add detail on the following screen.
CLIN/SLIN Wizard	Opens the Pricing Line Item Wizard described in section 3.2.4.3 above (applicable only to SeaPort-I procurement efforts).
Timeline…	Opens the Timeline window described in section 4.2.2.3 below.
Expand CLINs	Allows the user to see all SLINs associated with a CLIN. CLINS are presented with the details collapsed when the page length exceeds the system-defined limit (this is rare).
Actions	Choose the new document icon to create a new SLIN. Choose the pen icon to edit, the trashcan icon to delete, or the disk icon to save.

Figure 74: SD – Pricing Structure

4.2.2.1   New CLIN

Selecting the *New CLIN* button will open the window shown in Figure 75 below as a pop up. After selecting New CLIN the user enter the appropriate CLIN number that they wish to procure with and provide a short description of the new CLIN. The basic MAC contracts have within them a uniform CLIN structure based upon contract type. After clicking "Save," the CLIN is added and the user is returned to the main panel.

4.2.2.1.1   CLIN Structure

The MAC contracts contain contract line item numbers (CLINs) that can accommodate both Cost-Plus-Fixed Fee and Firm Fixed Price requirements. Each of these CLINs has a five-year period of performance. Including options, the maximum total potential duration of the MAC contracts is fifteen years. Every Task Order will follow the same general CLIN structure that was established in the MAC contracts:

✍ **COST-PLUS-FIXED FEE (CPFF/CPAF/CPIF)** Item 0001 (1000 for SeaPort-e), Option Items 0004/4000 and 0007/7000 - All requirements for Cost-plus-Fixed Fee (CPFF) level of effort (hours) or completion type services will be placed under these CLINs. Other Direct Costs, e.g. travel, associated with performance of work under these CLINs are included separately under Item 0003 (3000 for SeaPort-e) and option Items 0006/6000 and 0009/9000 since contractors will not be paid any fee on the ODC costs.

☞ **FIRM FIXED PRICE (FFP)** Item 0002/2000, Option Items 0005/5000 and 0008/8000 - All requirements for firm fixed price level of effort (hours) or completion type services will be placed under these CLINs. Included in the price are all direct and indirect costs, including Other Direct Costs, to complete the effort and profit.

☞ **COST ONLY** Item 0003/3000, Option Items 0006/6000 and 0009/9000 - These are cost only CLINs (contractor receives no fee) where contractors will be reimbursed for the allowable, allocable and reasonable other direct costs (ODCs) required to perform effort under Items 0001/1000 and Option Items 0004/4000 and 0007/7000. These items may include costs such as travel, facilities, incidental supplies, and mailing/packaging costs. Whether or not a specific type of charge should be classified as an ODC directly chargeable to the contract will depend on the Contractor's accounting system.

Create New CLIN

Please enter a CLIN ID:
Note: New CLIN ID scheme (1000 - 9999) pertains to SeaPort-e efforts only. SeaPort-I efforts will use the CLIN IDs ranged from 0001 - 0009.

[Cancel] [Next]

Valid CLINS are:

Cost Type:	0001, 0004, 0007, 1000's, 4000's, and 7000's
Firm Fixed Price:	0002, 0005, 0008, 2000's, 5000's, and 8000's
ODC (Cost Only):	0003, 0006, 0009, 3000's, 6000's, and 9000's

Period of Performance for each CLIN is as follows:

CLINS	Period of Performance
0001 or 1000's	05-APR-04 TO 04-APR-09
0002 or 2000's	05-APR-04 TO 04-APR-09
0003 or 3000's	05-APR-04 TO 04-APR-09
0004 or 4000's	05-APR-09 TO 04-APR-14
0005 or 5000's	05-APR-09 TO 04-APR-14
0006 or 6000's	05-APR-09 TO 04-APR-14
0007 or 7000's	05-APR-14 TO 04-APR-19
0008 or 8000's	05-APR-14 TO 04-APR-19
0009 or 9000's	05-APR-14 TO 04-APR-19

Figure 75: SD – New CLIN

Next, the user will be prompted to categorize the new CLIN as either an Informational CLIN (with funding at the SLIN level) or Priced CLIN (funding at CLIN level). **Note:** Should a user select Priced CLIN, they will have the option of adding Informational SLINs in order to break out Fund Types and Lines of Accounting. For more information on Informational SLINs to a Priced CLIN, refer to Section 5.2.3.2.3.1.

Create New CLIN

Please choose a CLIN category below:

   ○ Informational

   ○ Priced

[Previous] [Next]

Figure 76: SD – New CLIN – CLIN Categorization
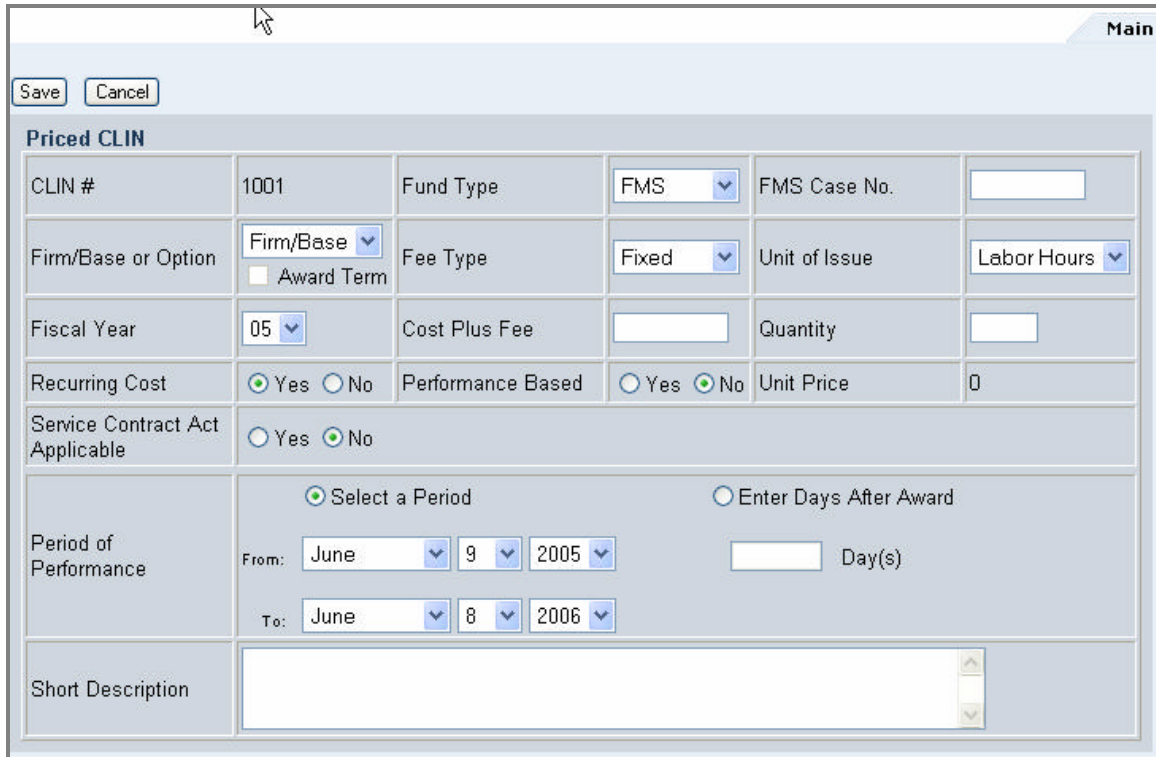
For Informational CLINs, SeaPort will then prompt the user for a Short Description.

Create New CLIN

CLIN ID: 1001

Short Description

☑ **Automatically create ODC (Cost Only) CLIN.**

[Save] [Cancel]

Figure 77: SD – New CLIN – Short Description

Priced CLINs will instead be routed directly to the edit details screen.

Figure 78: SD – New CLIN – Priced CLIN Details

For Informational CLINs, SeaPort provides the first Sub-Contract Line Item Number (SLIN) automatically. SLIN detail can be added by clicking on the edit icon ✐, which will bring up the detail screen seen in Figure 52. Additional SLINs may be added by choosing the *Add SLIN* button ⊞ and entering the appropriate information.

4.2.2.2 Edit SLIN Details

A SLIN is a sub line item number. Informational CLINs are comprised of SLINs. In SeaPort-e, SLINs are added either by creating an Informational CLIN, or by clicking on the *Add SLIN* ⊞ button within an existing CLIN.

Under the MACs most task orders will have numerous SLINs. This is driven by two things:

1. Unlike most existing NAVSEA service contracts that have a separate CLIN for each year's requirements, each CLIN of the MACs extends for five years of performance. To create annual options, it will be necessary to create separate SLINs. For example, a base period plus two option periods will require three SLINs:

    1. 0002AA Base Year

    2. 0002AB First Option Year

    3. 0002AC Second Option Year

> **NOTE:** While a CLIN can last for five years, rules regarding availability of funds for obligation and expenditure still govern how the period of performance for a specific SLIN is structured (e.g., O&M,N expires at the end of the fiscal year)

2. The rule regarding only having one line of accounting for each SLIN still applies. So to accommodate the use of different funds, it will be necessary to use different SLINs, just as NAVSEA currently does.
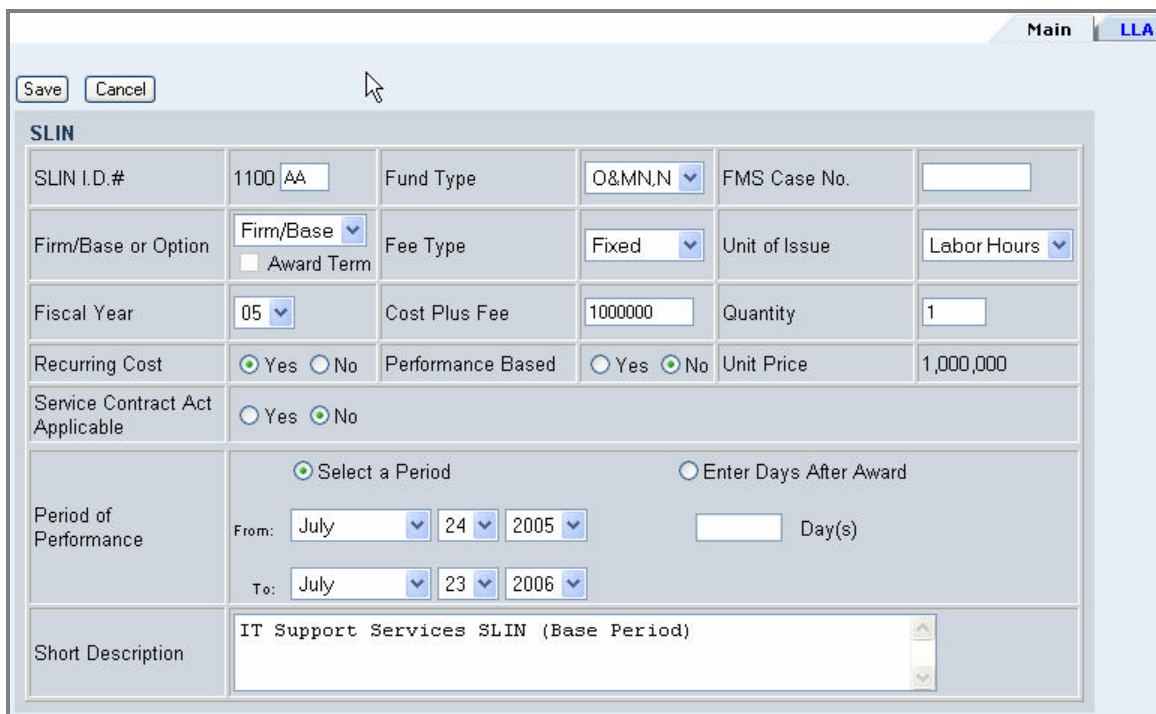
Selecting the *Add SLIN* 📧 icon on the CLIN line opens the SLIN Details page.

The image in Figure 79 below shows the SLIN page for a Cost Type SLIN. Other SLIN types have similar pages. A separate SLIN is required for each appropriation type of fund, each fiscal year, and each option.

> **NOTE:** When adding the first Cost Type CLIN, the system will automatically add the first Cost Type SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.

4.2.2.2.1 Main

The Main tab allows the user to edit information that was entered when the SLIN was created

Figure 79: SD – Edit SLIN Details (Cost Type) – Main

After a SLIN is created, the information may later be edited. During the Solicitation stage, there is also an LLA tab in addition to the Main tab of the SLIN details page.

4.2.2.2.2 LLA (Long Line of Accounting)

If LLA (Long Line of Accounting) information has been imported from an external financial system, it will be reflected here. The LLA information needs to be entered for the Task Order to be executed.
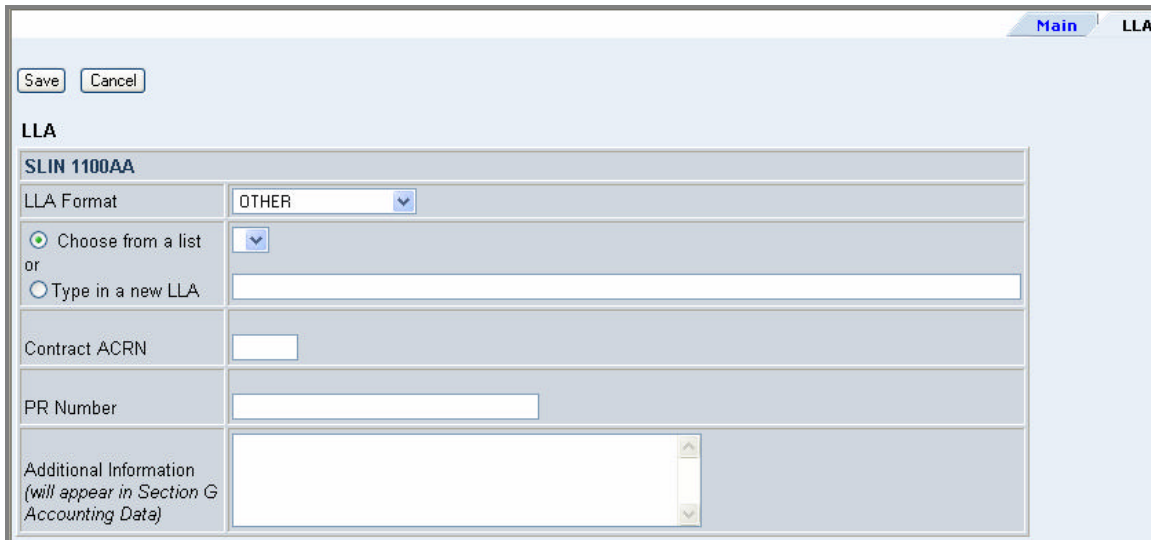
Figure 80: SD – Edit SLIN – LLA

4.2.2.3   Timeline

The *Timeline* button opens the page shown in Figure 81. The timeline provides detailed period of performance information. Bulk adjustments may be made to many SLINs at once using the Timeline feature.

> **NOTE:**   Timeline features are designed to function with Microsoft Internet Explorer only. In other browsers, the *Timeline* button will not be visible.

Table 39: SD Timeline Window – Buttons

Button	Description
Return to Form	Return to the Pricing Structure Panel.
Copy Period	This button is only available when 2 or more periods are selected. The period of performance of the first selected SLIN will be imposed on the other SLINs selected.
Sequence Periods	This button is only available when 2 or more periods are selected. The selected SLINs will be lined up in consecutive periods of performance.
Details…	Opens the SLIN details window shown in Figure 79 for the selected SLIN.
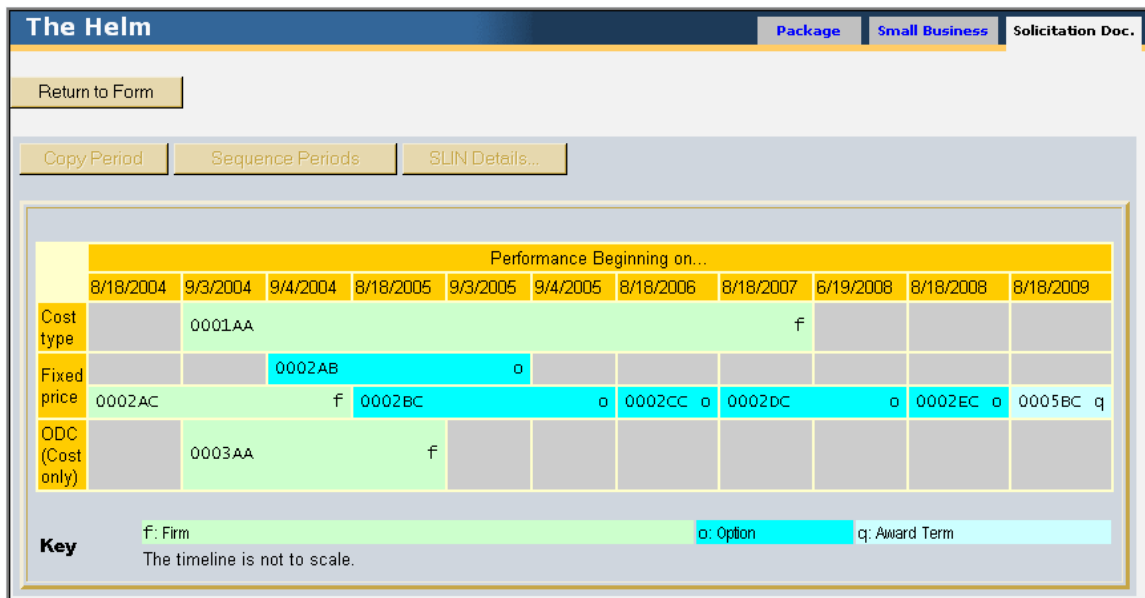
Figure 81: SD – Timeline

4.2.3   Add Requirements data

The Requirements Panel contains all the information about the actual contractor effort required. The Requirements Panel consists of a list of links (noted in blue text). Blank icons reveal text Sections with no data entered. Filled icons reveal Sections with existing data. Here you will see all of the sections you are used to working with in a Solicitation Document. Some of the sections are pre-populated. The following sections are available from the Requirements page.

- Comments
- General Information
- Supply and Services
- Section B Text
- Section C Statement of Work
- Section D Packaging and Marking
- Section E Inspection and Acceptance
- Section F Deliveries or Performance
- Section G Contract Administration Data
- Section H Special Contract Requirements
- Section I Contract Clauses
- Section J List of Attachments
- Section K Contractor's Certifications
- Section L Instructions to Offerors

- ✎ Section M Evaluation Criteria
- ✎ Award Term Clause
- ✎ Award Term Plan
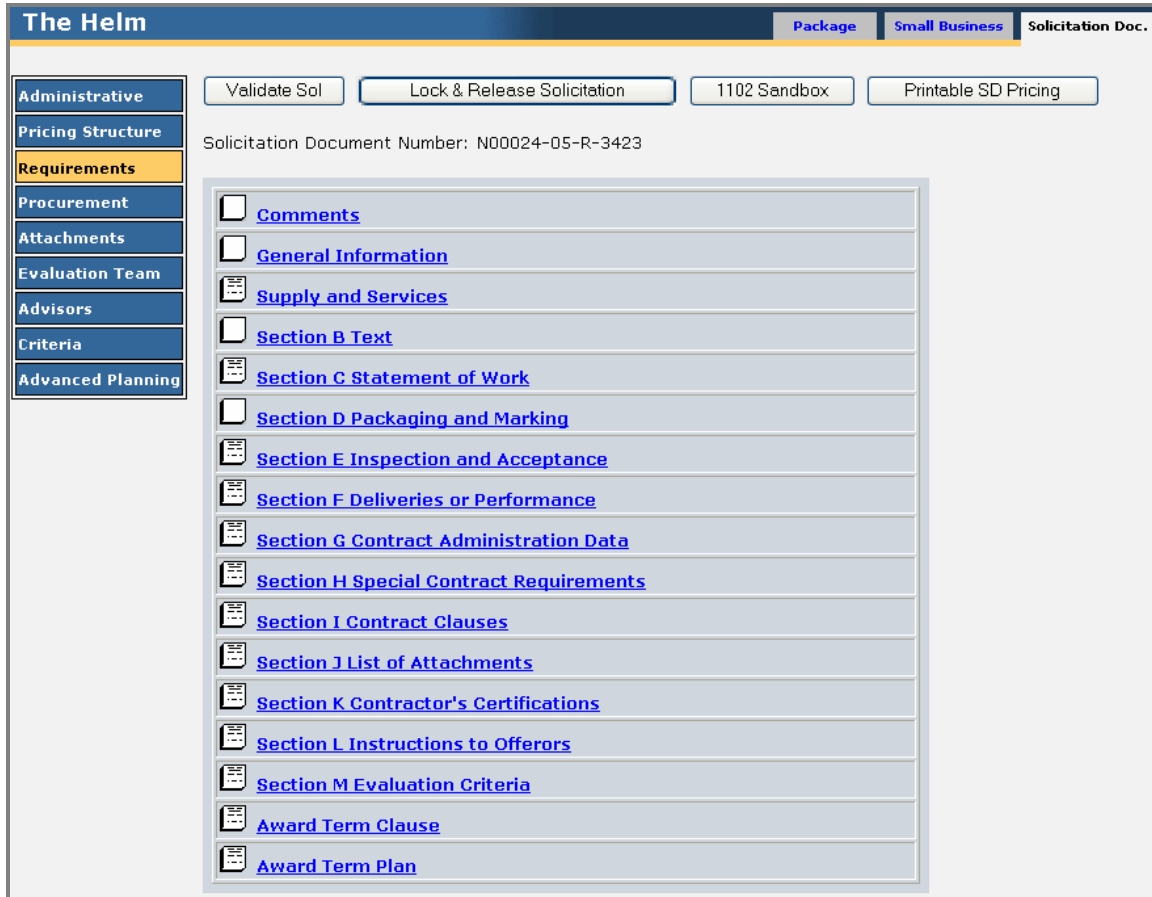
Figure 82: SD – Requirements List

4.2.3.1 Requirements Detail

Each requirement in the list is represented by a link. Selecting any of these links will bring up a Requirements Details window in which to enter the actual text of the requirement. An example of such a window is found in Figure 83. Table 40 and Table 41 below detail the fields and buttons contained on the entry forms.

> **NOTE:** Typing into an area that is auto filled can result in your typed text being overwritten by the template text.

> **NOTE:** Standard I Clauses are already contained in the MAC Contract. Only include any additional or special I Clauses.

Table 40: SD Requirements Detail – Fields

Field	Type	Description
Text Entry	Text Box	Enter the text of the Requirement.

Field	Type	Description
[[--preformatted-On--]]	Command	"Typewriter" mode. Each space and carriage return in the textbox appears verbatim in the PDF. Lines do not wrap. This is how to preserve your line-breaks and alignment onscreen and in the PDF. Use this technique for addresses, poetry, tabular text, etc.
[[--preformatted-Off--]]	Command	Resume "wrapping" long lines to form paragraphs. Normal text. Press Enter at the end of each paragraph.
[[--table--]]	Command	The following lines constitute a table, with a Tab between cells. To add a column insert a Tab into each row. **Note:** In the PDF, every table occupies the full width of the page.
Commercial/Special	Radio	Choose Commercial or Special. **Note:** Only available in Section D Packaging and Marking.

Table 41: SD Requirements Detail – Buttons

Button	Description
Save	Saves the text in the text area.
Save & Close	Saves the text in the text area and closes the window.
Preview	Brings up another window that displays the text as it will appear in the PDF document. (This is especially useful when using the formatting commands)
Pin...	Brings up a window where the system's automatic fill-ins (e.g., number of hours, SLINs are fully-funded, etc., etc.) are marked with a checkbox. If you need to "freeze" any of those substitutions so it becomes plain text and ceases to automatically update, checkmark it and press Save. Fill-ins that you leave unchecked will continue to update automatically.
Help	Brings up the Help system in a separate window. The Help system here contains details and examples to assist in using the formatting commands listed in Table 40 above.
Cancel	Closes the window without saving changes.
View Templates	Represented by the icon. Opens a pop up window that contains all templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them.

Figure 83: SD – Requirements Detail

4.2.3.2 Requirements Templates

Selecting the templates icon opens a pop up window that contains all of the SeaPort templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them. After selecting the templates icon from the Requirements Details page, a window will appear where the user can choose a template. An example of this window is represented in Figure 84 below. Different Requirements will have different templates available (or no templates at all), but the procedure for choosing a template is the same.

Table 42 and Table 43 below detail the fields and buttons contained on template page.
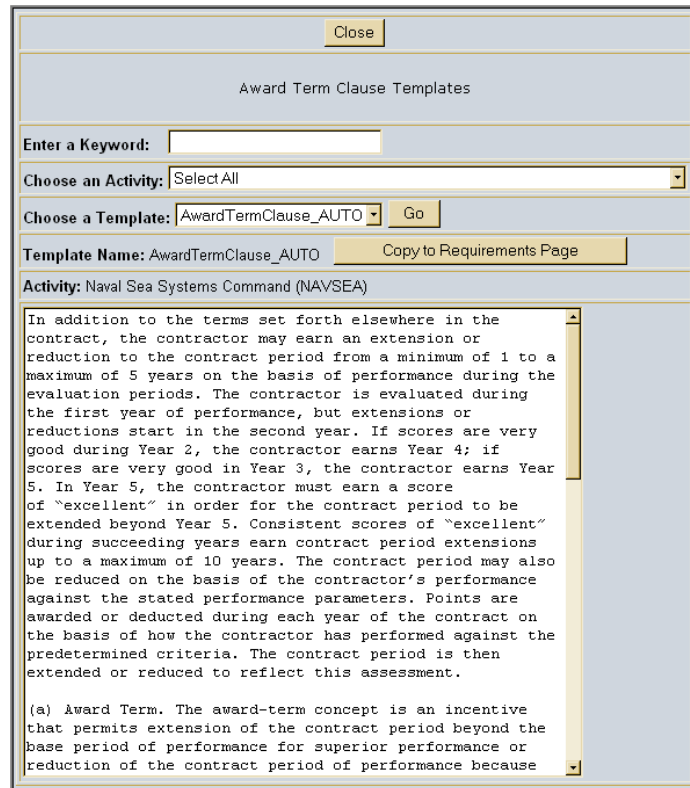
Table 42: SD Template Page – Fields

Field	Type	Description
Enter a Keyword	Text Box	A keyword can be any search term that is contained in the text of the template. Entering a keyword and selecting *Go* will list only those templates that contain that keyword.
Choose an Activity	Dropdown	Choose an Activity from the dropdown list. Choosing an Activity and selecting *Go* will list only those templates that are part of that Activity.
Choose a Template	Dropdown	Choose a template from the dropdown list. Choosing a template and selecting *Go* will display the template text in the textbox below.
Template Name	Read Only	System-generated based on the selected template.
Activity	Read Only	System-generated based on the selected template.
Template Text	Text Box	This is the actual text of the selected template. You can read the text of any template here before you choose to include it in your requirement. **Note:** You will have the opportunity to edit the template text after it is copied into the requirement.

Table 43: SD Template Page – Buttons

Button	Description

Button	Description
Close	Closes the Templates window.
Go	Searches the SeaPort templates repository for a template that matches the selected criteria.
Copy to Requirements Page	Copies the text displayed in the Template Text Box to the Requirement.

Figure 84: SD – Requirements Template

4.2.3.3   Importing text from Microsoft Word

Requirements text may be imported from Microsoft Word or any other word processing program. Below are some hints for successfully importing text from Microsoft Word. These hints may or may not apply to other word processing software.

Follow these steps:

Step 6.   Locate each table in the Word document. Right above the table, put the following command: [[--table--]]

Step 7.   Locate each place where Seaport must refrain from forming paragraphs.

Before each such place, put the command [[--preformatted-On--]]

After each such place, put the command [[--preformatted-Off--]]

Step 8.   For each bullet list, choose whether it should come into Seaport as (a) paragraphs or (b) a preformatted section.

> If you take no special action, each bullet point will be a paragraph on its own.
>
> You can achieve a more compact result (if the bullet points are short) by using Preformatted mode for the bullet list.

Step 9. Select the text in the Word document.

Step 10. Paste it into Seaport.

> **NOTE:** You may paste into Seaport first, and then put in the command lines. But you may feel you get a better view of what's going on, using Word for those steps.

4.2.4   Add Procurement data

The Procurement Panel is the area of the SD section in which information specific to this acquisition is collected. Most of the information on this screen is automatically populated with the information taken from the PR.

Table 44: SD Procurement Panel – Fields

Field	Type	Description
Type of Procurement	Radio	Choose Competitive. The Sole Source option has been disabled in SeaPort.
DD254 Required	Radio	Choose Yes or No.
Award Term Consideration	Radio	Choose Yes or No.
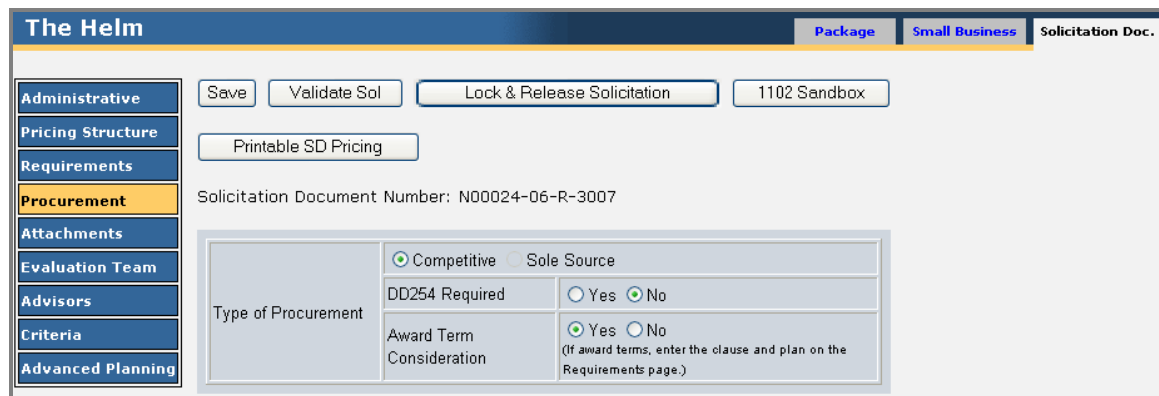
Figure 85: SD – Procurement

4.2.5   Add Attachments

The Attachments panel is the same in PR, SD and TO. Users are able to attach any electronic files to the SD that may apply. For example, drawings, specifications, organizational structures, government cost reasonableness, or background information may all be attached at the Attachments panel. Attachments that are added here are imported and put into the Bid Event when the Solicitation is released.

To add a new attachment, the user should select the *New* button. By selecting *Browse* on the following screen, the user is able to browse through their files. Files can be stored locally, on a network, or on a disk. Upon finding the file you wish to attach, double click on the file or

select the file and click *Open*. Enter a description, e.g, "Milestone Timeline" in the text box. Clicking the *Save* button returns the user to the main Attachments screen. Under the Actions column, the user can click the pen icon ✎ (to edit the Purpose text) or the trashcan icon 🗑 to delete an attachment.

> **NOTE:** In order to update an attachment that has already been added, you can delete the original and then upload the newer version of the file.

The Attachments panel is used to add attachments to the Solicitation Document. It contains the following data fields and buttons.

Table 45: SD Attachments Panel – Fields

Field	Type	Description
Filename	Link	The attachment's filename. Selecting this link will download the attachment. You may be prompted to either save or open the attachment depending on the attachment type.
Purpose	Read Only	The Purpose text that was entered when the attachment was saved. The Purpose text can be edited by selecting the Edit icon described below.

Table 46: SD Attachments Panel – Buttons

Button	Description
Delete All	Delete All attachments in the list.
New	Add a new attachment.
Edit	Represented by the icon ✎, the attachment's Purpose text can be edited.
Delete	Represented by the icon 🗑, the attachment can be deleted.
Save	Save the attachment and return to the Attachments panel.
Cancel	Return to the Attachments panel without saving the attachment.
Browse	Browse your computer, network resources, or removable media for a file.
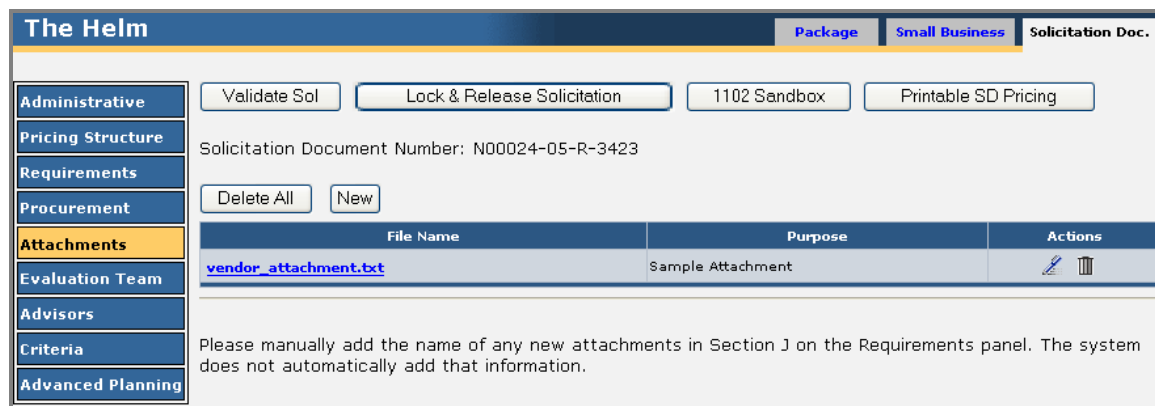
Figure 86: SD – Attachments – With Attachments
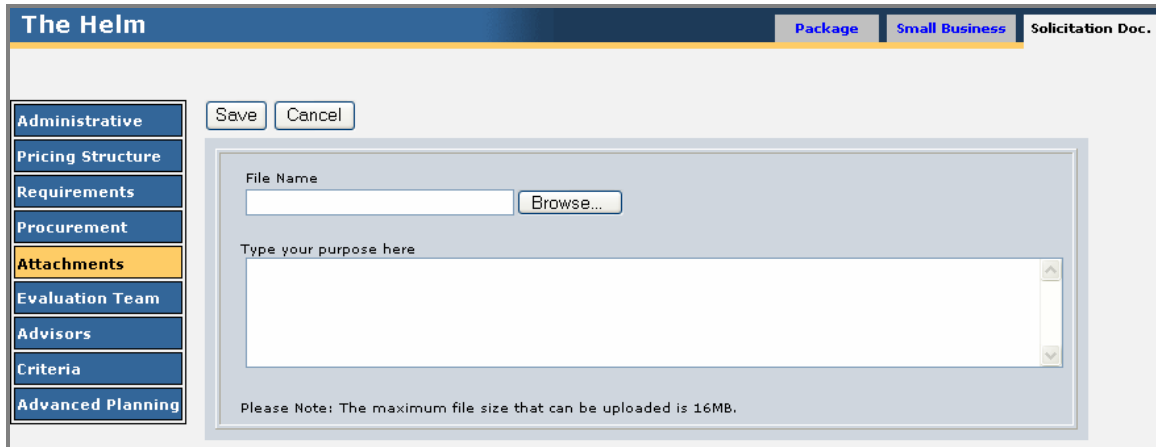
Figure 87: SD – Attachments – Add Attachment

4.2.6   Add Evaluation Team data

The solicitation Evaluation Team panel is identical in functionality to the Evaluation Team panel from the PR.

Evaluator data can be added using the User Search feature (described in section 3.2.1.3 above).

Only the Originator of a Purchase Request (PR) or Solicitation Document (SD) editor or the PCO can assign, remove, or change the chairman or members of the evaluation committee.

The Originator and PR editor perform their functions from the PR document screen; the PCO and SD editor perform these actions from the Solicitation Document screen. Regardless of the screen set used, to get started click the *Evaluation Team* button found in the left navigation area and follow these procedures:

Table 47: SD Evaluation Team Panel – Fields

Field	Type	Description
Evaluation Chairman	User Search	Use the User Search feature (described in section 3.2.1.3 above) to add the Evaluation Chairman name. Only one evaluation chairman can be assigned to an evaluation committee. The document originator or the PCO can assign the chairman. If it is desired that a Chairman submit his individual evaluation beside the summary evaluation, the chairman needs to be chosen as an evaluator as well.

Field	Type	Description
Evaluator	User Search	Use the User Search feature (described in section 3.2.1.3 above) to add Evaluators. Evaluators are those individuals who will evaluate the proposals once they are received. They should have expertise in one of the evaluated areas such as technical requirement or past performance. A registered evaluator is a person who already has a SeaPort account (i.e., a user id and password). There is no limit to the number of evaluators that can be assigned to an evaluation committee. When making workload assignments, an evaluator can be assigned to rate any or all of the following evaluation categories: ✍ Technical ✍ Past Performance ✍ Cost
Non-registered users	Text Box	A non-registered evaluator is a person who does not already have a SeaPort account. Manually enter the name of any evaluators that do not have SeaPort accounts. A text box is provided to record the name and assignments of those individuals. It is then up to the chairman or the PCO to notify those individuals to register. Non-registered evaluators must be given a SeaPort account before they can access the evaluation system.
Technical Evaluator	Checkbox	Choose this checkbox to designate this person as a Technical Evaluator. **Note:** Only a Cost Evaluator will see cost information.
Past Performance Evaluator	Checkbox	Choose this checkbox to designate this person as a Past Performance Evaluator. **Note:** Only a Cost Evaluator will see cost information.
Cost Evaluator	Checkbox	Choose this checkbox to designate this person as a Cost Evaluator. **Note:** Only a Cost Evaluator will see cost information.

Table 48: SD Evaluation Team Panel – Buttons

Button	Description
Find Chairman	Activate the User Search feature (described in section 3.2.1.3 above).
Find Evaluator	Activate the User Search feature (described in section 3.2.1.3 above).
Save	Save the list of Non-registered users.
Delete	Delete the evaluator from the list.
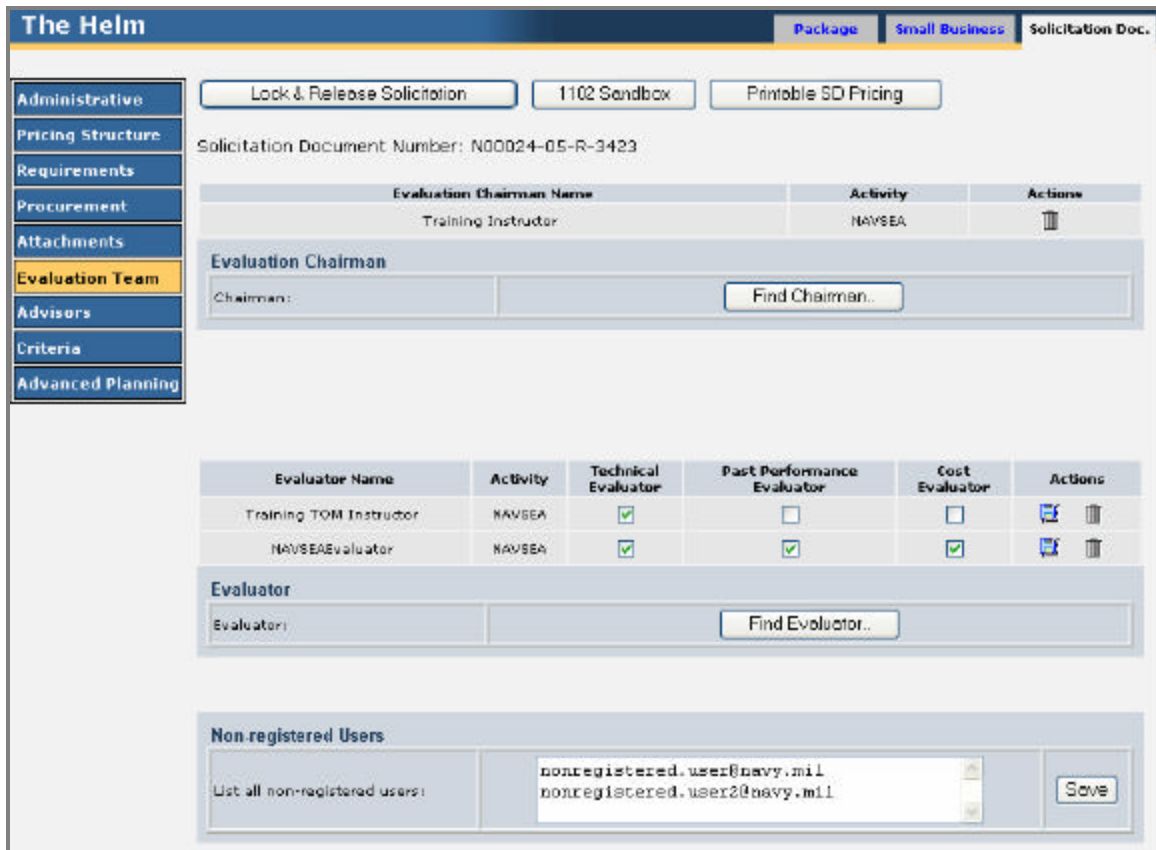
Figure 88: SD – Evaluation Team

4.2.7   Add Advisors data
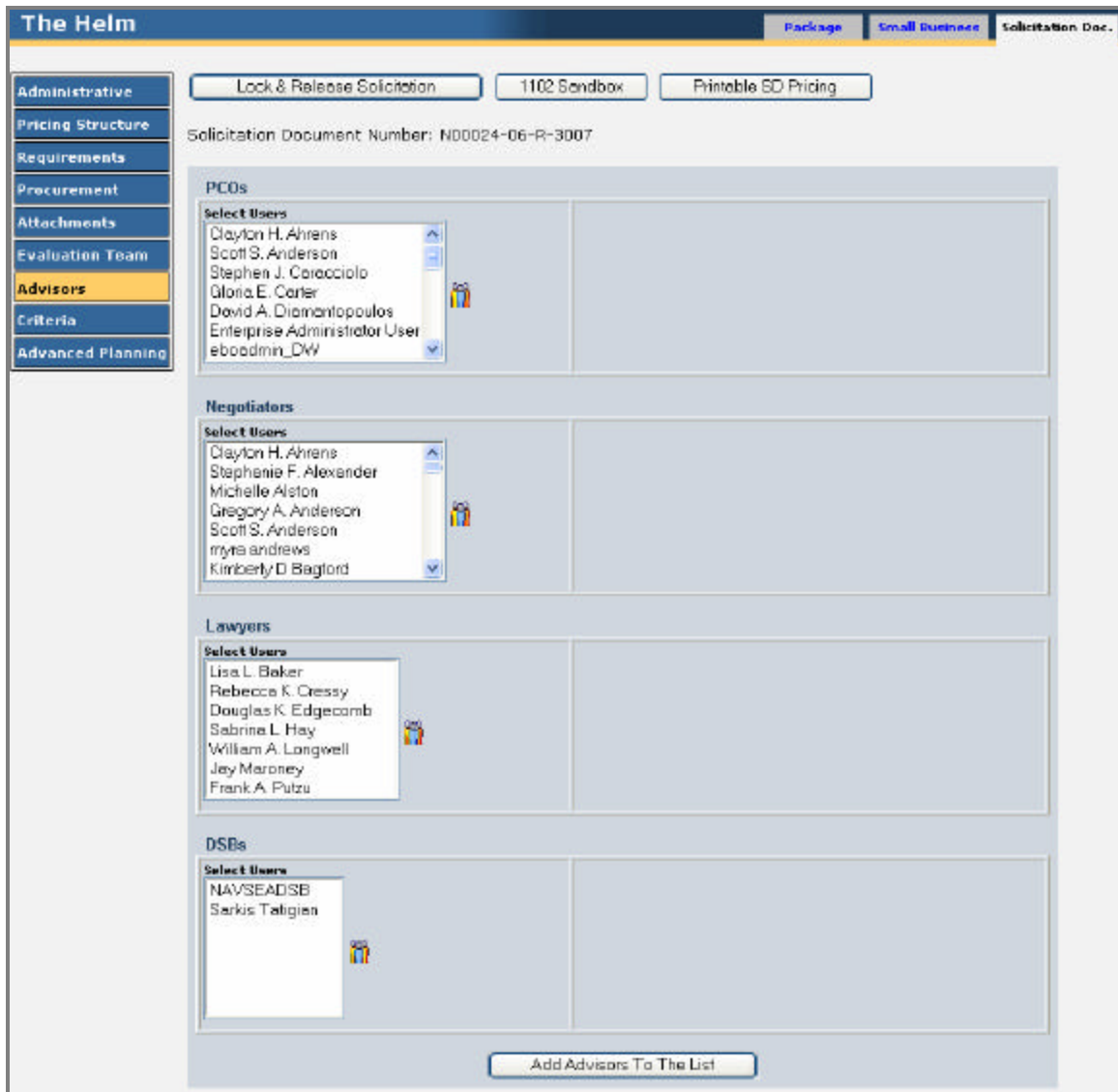
The Advisors panel lists all users that have been added to the Solicitation Document. Advisors have the option to review the bid evaluation process or proposals. Advisors can be added to or removed from this list. The controls featured on this page are described in Table 50 below.

Table 49: SD Advisors Panel – Fields

Field	Type	Description
PCOs	Multi-Select Box	Lists PCOs within the requesting activity that may be added as Advisors
Negotiators	Multi-Select Box	Lists Negotiators within the requesting activity that may be added as Advisors
Lawyers	Multi-Select Box	Lists Lawyers within the requesting activity that may be added as Advisors
DSBs	Multi-Select Box	Lists DSBs within the requesting activity that may be added as Advisors

Table 50: SD Advisors Panel – Buttons

Button	Description
Add To The List	Clicking this button will add the selected Advisor's name to the list above.
View All Activities	Selecting this icon. 📦 opens a pop-up window where the user can select users from Activities other than their own.
Remove	Selecting this icon 🗑 will remove the Advisor's name from the list.

Figure 89: SD – Advisors

4.2.8   Add Criteria data

The solicitation Criteria panel is identical in functionality to the Criteria panel from the PR.

Criteria data is information that relates to the submission and review of proposals.

Table 51: SD Criteria Panel – Fields

Field	Type	Description
Previous Contract Work	Radio	Was work done under a previous contract number? Choose Yes, No, or Don't Know.
Previous Work Under Non-DoD contract	Radio	Was previous work done under a Non-DoD contract? Choose Yes, No, or Don't Know.
Contractor currently performing the work	Text Box	The name of the contractor currently performing work on this contract, if applicable.
Contract Number	Text Box	The previous contract number, if applicable.
Contract Amount	Text Box	The previous contract amount, if applicable.
Steps	Radio	Will this be a one step or a 2 step process? Choose 1 Step, 2 Step or Don't Know. **One Step Process** Under a one step source selection process, bidders submit their proposals based on the solicitation. The proposals are evaluated and award is made. **Two Step Process** Under the first step of a two step source selection process, interested offerors are asked to submit a one or two page approach summarizing their technical experience and their past performance, as well as a "not-to exceed" (NTE) price. The submittals are evaluated and the top offerors are asked to participate in the second step of the process. The offerors that have been selected to submit proposals for the second step will explain in greater detail the ideas that they submitted in the first step. The SeaPort office can help the program manager decide whether a two step source selection process is appropriate.
Resume	Radio	You can also choose whether or not to receive resumes from those individuals who would be performing the service. Will resumes be required as part of the award determination process? Choose Yes, No, or Don't Know.
Oral Presentation	Radio	If you select to have oral presentations, you need to decide how long the presentations will be. You can also choose if you would like to receive written overviews to review. Will oral presentations be required as part of the award determination process? Choose Yes, No, or Don't Know.

Field	Type	Description
Maximum # of Pages Requested for Technical Approach	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their Technical Approach. Enter the maximum number of pages requested for the Technical Approach document, if applicable.
Maximum # of Pages Requested for Management Approach	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their Management Approach. Enter the maximum number of pages requested for the Management Approach document, if applicable.
Maximum # of Pages Requested for Past Performance	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their Experience Statement. Enter the maximum number of pages requested for the Past Performance document, if applicable.

Figure 90: SD – Criteria

4.2.9   Release Advanced Planning Data

The solicitation Advanced Planning panel is identical in functionality to the Advanced Planning panel from the PR.

The Advanced Planning provides estimated target dates for various milestones in the acquisition lifecycle. Only a PCO may release the dates to the vendor community.
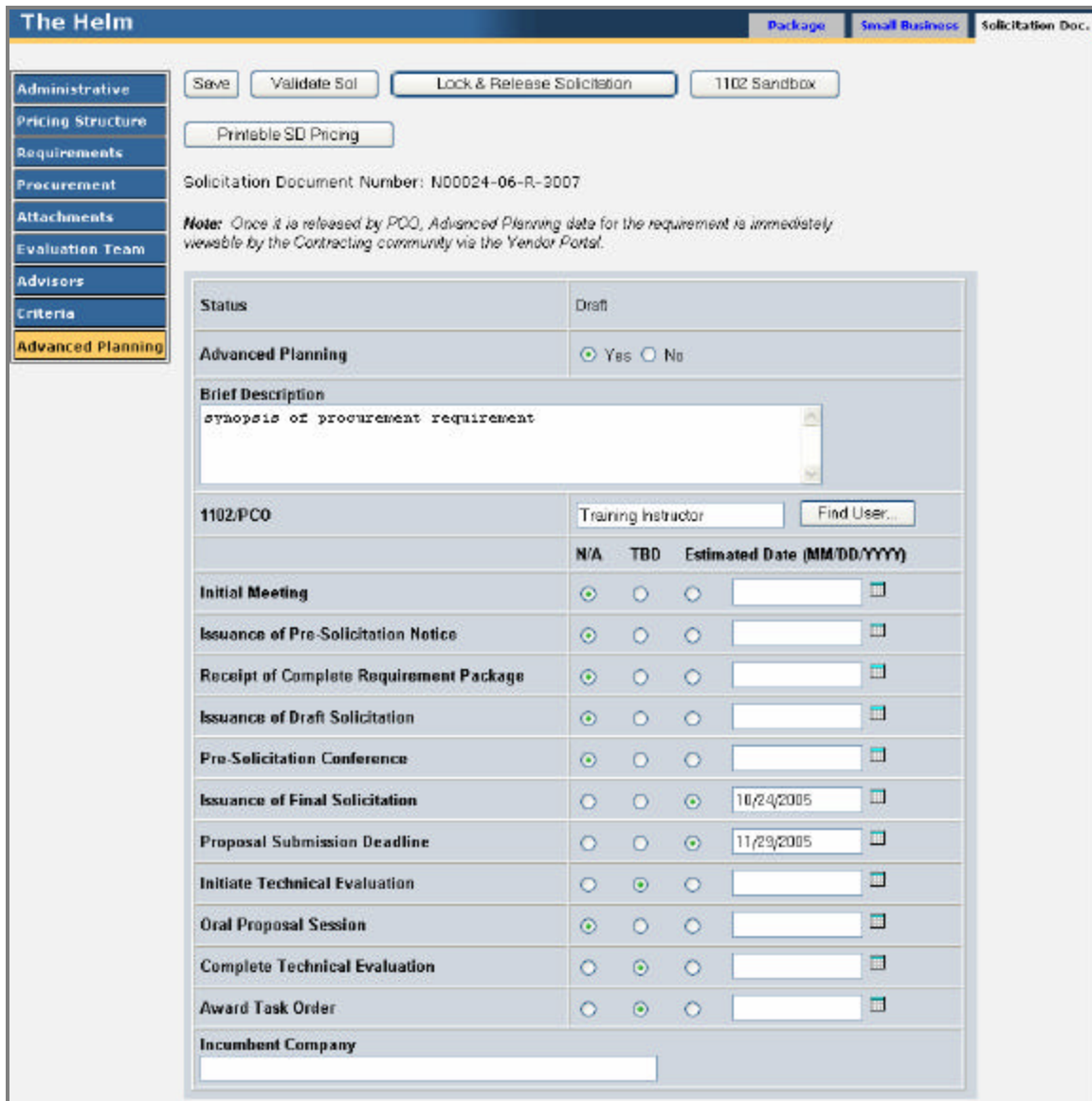
Table 52: SD Advanced Planning – Fields

Field	Type	Description
Advanced Planning	Radio	Indicate whether or not to provided Advanced Planning notice. Choose Yes or No.
Brief Description	Text Box	Provide a synopsis of the procurement effort.
1102/PCO	User Search	Use the User Search feature (described in section 3.2.1.3 above) to add the 1102 or PCO name who will serve as a point-of-contact.
Initial Meeting	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Issuance of Pre-Solicitation Notice	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Receipt of Complete Requirement Package	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Issuance of Draft Solicitation	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Pre-Solicitation Conference	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Issuance of Final Solicitation	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Proposal Submission Deadline	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Initiate Technical Evaluation	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Oral Proposal Session	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.

Field	Type	Description
Complete Technical Evaluation	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Award Task Order	Radio, Text, & Calendar Utility	Specify whether this milestone is not applicable to the procurement effort (N/A), not yet known (TBD) or known (Estimated Date). If known, provide a date in the text box or via the calendar utility.
Incumbent Company	Text Box	Indicate who the incumbent company is.

Table 53: SD Advanced Planning Panel – Buttons

Button	Description
Release Planning	Allows the user to release the specified advanced planning dates to the vendor community. Only PCOs will have access to the Release Planning button.

Figure 91: SD – Advanced Planning

4.2.10   Review Questions & Answers (Q&A)

The Q & A panel lists all questions and answers that have been added to the Solicitation Document. Questions are posed by vendors or government users and responded to by the event creator, or a government user in the event creator's activity or higher, on an event-by-event basis through the Bid Event System. The fields and controls featured on this page are described in Table 54 and Table 55 below.

Note that the Q&A Panel will not be visible until the Solicitation has been released.
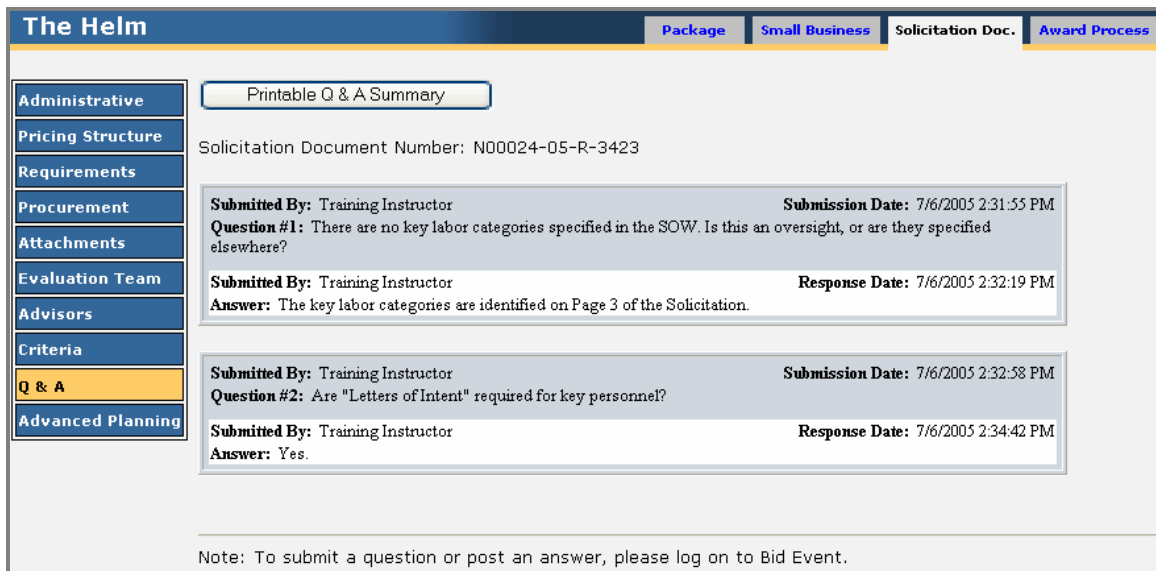
Table 54: SD Q & A Panel – Fields

Field	Type	Description

Field	Type	Description
Submitted By	Text	This is the person who created the Question/Answer. **Note:** To submit a question or post an answer, you must log on to the Bid Event System.
Question #	Text	The question text as it was entered in the Bid Event System. This field is not editable. **Note:** To submit a question or post an answer, you must log on to the Bid Event System.
Answer	Text	The answer text as it was entered in the Bid Event System. This field is not editable. **Note:** To submit a question or post an answer, you must log on to the Bid Event System.

Table 55: SD Q & A Panel – Buttons

Button	Description
Printable Q & A Summary	Loads a printable (reduced graphics) version of the page in a separate browser window

Figure 92: SD – Q & A

4.2.10.1   Answer a Question

To answer a question, log into the Bid Event System and find the Solicitation in the Event Listing. The Q&A column indicates how many Questions and Answers have been submitted for each Event. Select the *View Details* button for that Event. The Event Listing page is shown in Figure 93 below.

Figure 93: SD – Q& A - Answer a Question - Event Listing

From the View Event Details page, select the *Questions and Answers* button. The View Event Details page is shown in Figure 94 below.

> **TIP:** The numbers shown on the Questions and Answers lines in the Event Details are also links to the Question Listing page.

Figure 94: SD – Q&A - Answer a Question - View Event Details

From the Question Listing page locate the Question you wish to answer. Select the *Answer This Question* button. The Question Listing page is shown in Figure 95 below.

AQUILENT

❓ Help   ⊗ Logout

Logged in as: DougAll

Current Time: 1/28/2005 3:58 PM
All times displayed in '(GMT-05:00) Eastern U.S.'

Events   **Messages**

Question Listing for 'N00024-05-R-3103:1'

[Ask New Question] [Back]

You can use the asterisk (*) as a substitute for zero or more characters when you filter.

Status: [▼]

Question Number: [   ]

Question Text: [   ]

[Filter] [Show All]

Previous | Showing 1 to 4 of 4 | Next

Submitted By: DougAll   **Submission Date:**
                                               1/28/2005 3:37:33 PM

Question 1: Is the two page limit for each of the past performance references or is the two page limit to include all past performance information?

Answered By: DougAll   **Response Date:** 1/28/2005
                                               3:38:05 PM

Answer: Limit the response to two full pages for each past performance reference that is submitted.

Submitted By: DougAll   **Submission Date:**
                                               1/28/2005 3:39:08 PM

Question 2: There are no key labor categories specified for the work in the SOW. Is this an oversight or are these labor categories not cinsidered to be key?

Answered By: DougAll   **Response Date:** 1/28/2005
                                               3:39:41 PM

Answer: The key labor categories are identified on page 3 of the Solicitation.

Submitted By: DougAll   **Submission Date:**
                                               1/28/2005 3:41:32 PM

Question 3: Are "Letters of Intent" required for key personnel?

No answer has been posted to this question since the answer is still in draft.

[Edit Answer]

Submitted By: DougAll   **Submission Date:**
                                               1/28/2005 3:57:49 PM

Question 4: Are there supposed to be FFP items in this solicitation?

No answer has been posted to this question.

[Answer This Question]

Previous | Showing 1 to 4 of 4 | Next

[Ask New Question] [Back]

Figure 95: SD – Q&A - Answer a Question - Question Listing
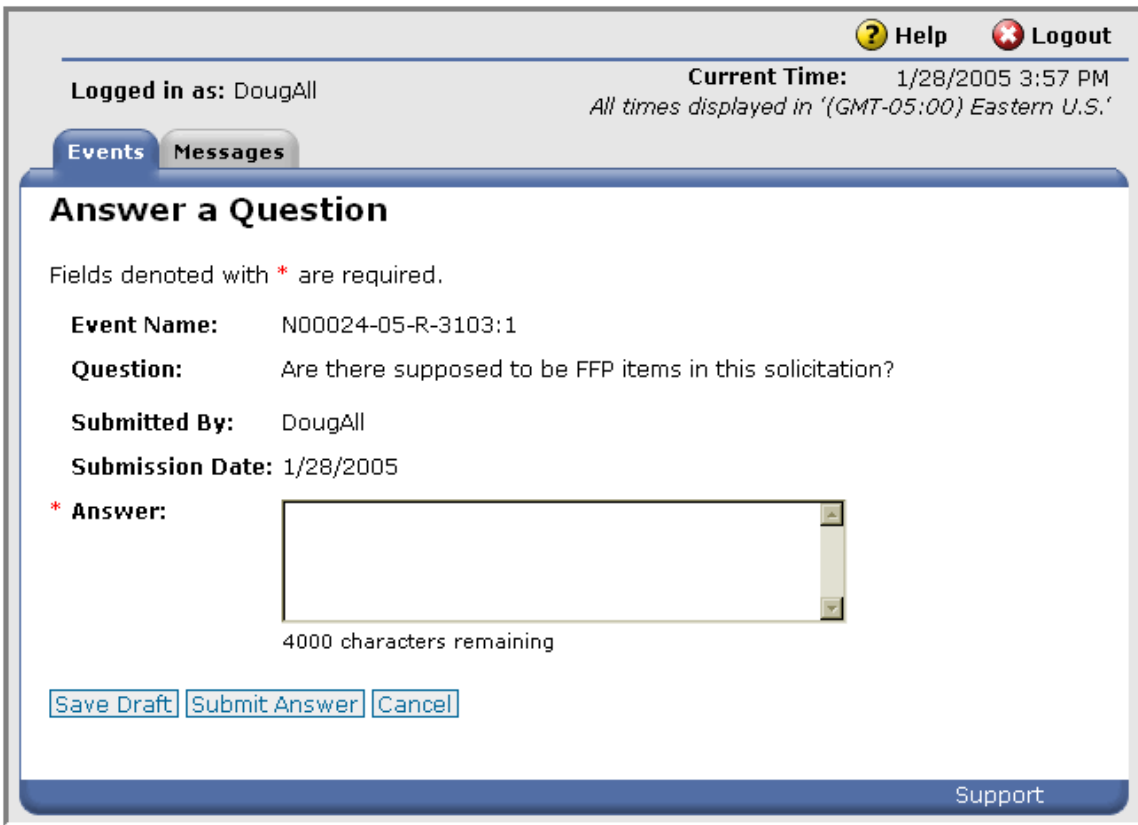
Respond to the Question by entering text in the Answer text box and selecting the *Submit Answer* button.

NOTE: Once an Answer has been submitted, it may no lover be edited.

If you wish to submit your answer at a later time and would like to save the text you have entered in the Answer text box, select the *Save Draft* button. Your text will be saved and you can edit it at a later time by selecting the Edit Answer button from the Question Listing page in the Bid Event System. Answers saved as draft are not visible to other users.

If you wish to discard your Answer text, select the *Cancel* button.

The Answer a Question page is shown in Figure 96 below.

Figure 96: SD – Q&A - Answer a Question - Answer a Question

4.2.11   Small Business Set Aside

Use the Small Business tab at the top of the screen to access this panel. Saving the Small Business Set Aside selection will allow the Solicitation to be released. Choose a PCO Set Aside Selection and enter a Justification if necessary.

Save the Selection or Save and Invite the DSB (Deputy for Small Business) by choosing the appropriate button. Selecting the *Save and Invite DSB* button will send an e-mail to the DSB. The DSB will complete the DSB Set Aside Selection section. The document doesn't have to

be in the DSB mailbox to be reviewed. The PCO will be notified via e-mail once the DSB has submitted his review input. The Small Business Set Aside panel contains the following fields:

NOTE: If this information was completed and saved as part of the PR creation process, it does not have to be entered again now.

Table 56: SD Small Business Set Aside Panel – Fields

Field	Type	Description
Section C	Link	This link opens the Section C (Statement of Work) for this SD in a separate window.
Section L	Link	This link opens Section L (Instructions to Offerors) for this SD in a separate window.
Section M	Link	This link opens Section M (Evaluation Criteria) for this SD in a separate window.
Subcontracting Plan Required	Radio	Choose *Yes* or *No*.
Previous Acquisition	Check Box	Check all that apply.
Recommended Sources	Text Box	Enter Recommended Sources here in plain text.
PCO Set Aside Selection	Radio	Choose *Full Set Aside*, *Cascade*, or *No*. If *No* is selected, a Justification is required.
Justification (PCO)	Text Box	Enter the justification for selecting *No* Set side Selection. Required if *No* is selected above.
DSB Set Aside Selection	Radio	Choose *Full Set Aside*, *Cascade*, or *No*. If *No* is selected, a Justification is required.
Justification (DSB)	Text Box	Enter the justification for selecting No Set side Selection. Required if *No* is selected above.

Table 57: SD Small Business Set Aside Panel – Buttons

Button	Description
Save Selection	Save changes to the database.
Save and Invite DSB	Save changes and also invite the DSB to make Set Aside selections. An e-mail notification will be generated and sent to the DSB.
Printable Review	Loads a printable (reduced graphics) version of the page in a separate browser window

Figure 97: SD – Small Business – Set Aside

4.2.12   Lock and Release Solicitation

This button will only be available to a user with PCO privileges. Selecting the *Lock & Release Solicitation* button from any page on which it is displayed will begin the Solicitation Release process and lock the Solicitation Document. The system will display the page shown in Figure 98 below. Any changes to the Solicitation after it is released will require a Solicitation Amendment.

Table 58: SD Lock and Release Solicitation Panel – Buttons

Button	Description
Return to Form	Returns to the Solicitation Document Administrative Panel. No changes are made.
Change Reviewer..	Change the Program Office Reviewer (named in table below). The *Add* User button uses the User Search feature described in section 3.2.1.3 above.
Add User..	When the Solicitation is released the Program Office Reviewer, the Originator, and the Evaluator(s) will receive a system-generated e-mail notification. You may add additional SeaPort users to this list by selecting the *Add user* button. The *Add* User button uses the User Search feature described in section 3.2.1.3 above.
Yes, Lock & Release Solicitation	Upon selecting the *Yes, Lock & Release Solicitation* button from this page, the system performs a validation of the data entered on all Solicitation Document pages.
	After successful validation of the data, the system generates a Final Solicitation in the form of a PDF file and generates an e-mail notification.
	If the validation fails, the system reports the errors requiring attention via a message box. You are then given the opportunity to return to the Solicitation Document form to complete the missing information and correct any other errors.
	TIP: If there are errors in the validation process, it may be useful to write these errors down or make a screen print of the message box to refer to when you return to the SD form.
	Locking and Releasing the Solicitation will:
	✍ Prevent future changes to this Solicitation
	✍ Create the final PDF for this Solicitation
	✍ Require a Solicitation Amendment for any future changes
No, Return to Form	Returns to the Solicitation Document Administrative Panel. No changes are made.

NOTE: Before being released, a Solicitation Document must be validated. You can use the *Validate Sol* button on the form pages to validate your data without attempting to lock and release the solicitation. The SD can be validated as many times as is necessary until validation is successful.

Figure 98: SD – Lock & Release

The Lock & Release page gives the user an opportunity to change the reviewer, to add users to the notification list, or to cancel the action. Proceeding with the Lock & Release action will create the final solicitation PDF as shown in Figure 99 below (PDF creation in progress). Once the PDF is created, you will be taken through the Bid Event creation process. Click the "here" link to proceed.

Figure 99: SD – Final Solicitation

After clicking on the "here" link in Figure 99 above, the *PDF is Ready* page shown in Figure 100 will be displayed. Select the *Create Bid Event* button to start the Bid Event Creation process.

> **NOTE:** It may take a minute to prepare your PDF. If this is the case, the system will keep you updated on the status until the PDF is ready. When the PDF is ready, you will see the page shown in Figure 100 Below.
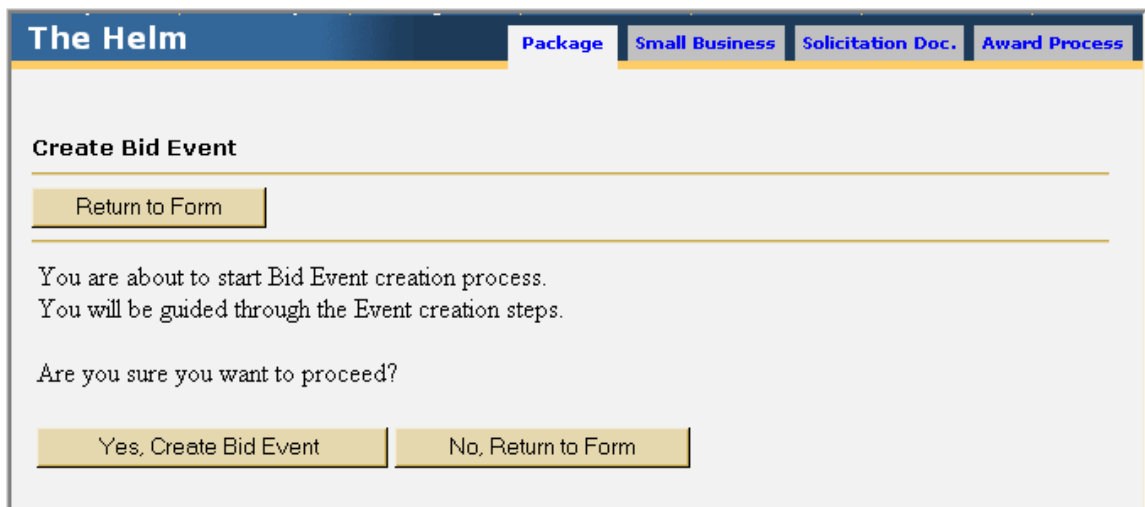
Figure 100: SD – PDF is Ready

> **TIP:** To view the PDF file, click on the "Your PDF" link. It will open in the Adobe Acrobat Reader. If you chose to view the PDF file, it can be saved from the viewer's window.
>
> **TIP:** If you want to save a copy of the Solicitation PDF without viewing it first, you can right click the link and choose "Save Target As…" from the pop-up window (Internet Explorer).

Selecting the *Create Bid Event* button from the *PDF is Ready* page displays the *Create Bid Event* page. The *Create Bid Event* page is shown in Figure 101 below.

Figure 101: SD – Create Bid Event

From this page, select the *Yes, Create Bid Event* button to continue. The *Create New Event* wizard will open in a new window and the bid event creation process will begin. This process is described in Section 4.2.14.2.1 below.

4.2.13   Solicitation Amendment Process

If a Solicitation Amendment needs to be created the PCO chooses the specific package from the Document Library and presses the *Create Amendment* button from the Package Home Page as shown below.

Figure 102: SA – Create Amendment Button

Upon pressing the *Create Amendment* button the user is presented with a verification box. If the user chooses to continue and create the amendment, the system generates the next sequential amendment number for the specific solicitation, and places the user on the Administrative panel in a draft Solicitation Amendment document. From this point forward the process is identical to the solicitation process defined earlier in this document.

4.2.14   Create Bid Event

Creating a Bid Event allows vendors to access the Final Solicitation PDF and its associated attachments. When creating a new Bid Event, you will determine the start and stop time of the event, manage (add or delete) attachments, and notify vendors. Vendors will log into the Bid Event System to view solicitations and to upload bids and attachments.

4.2.14.1   Accessing the Bid Event System

All government users will have access to the Bid Event Module. However, the user's role will determine the level of access. Originators, for example, will have only read-only access to the bid event system.

There are two ways to access the Bid Event System:
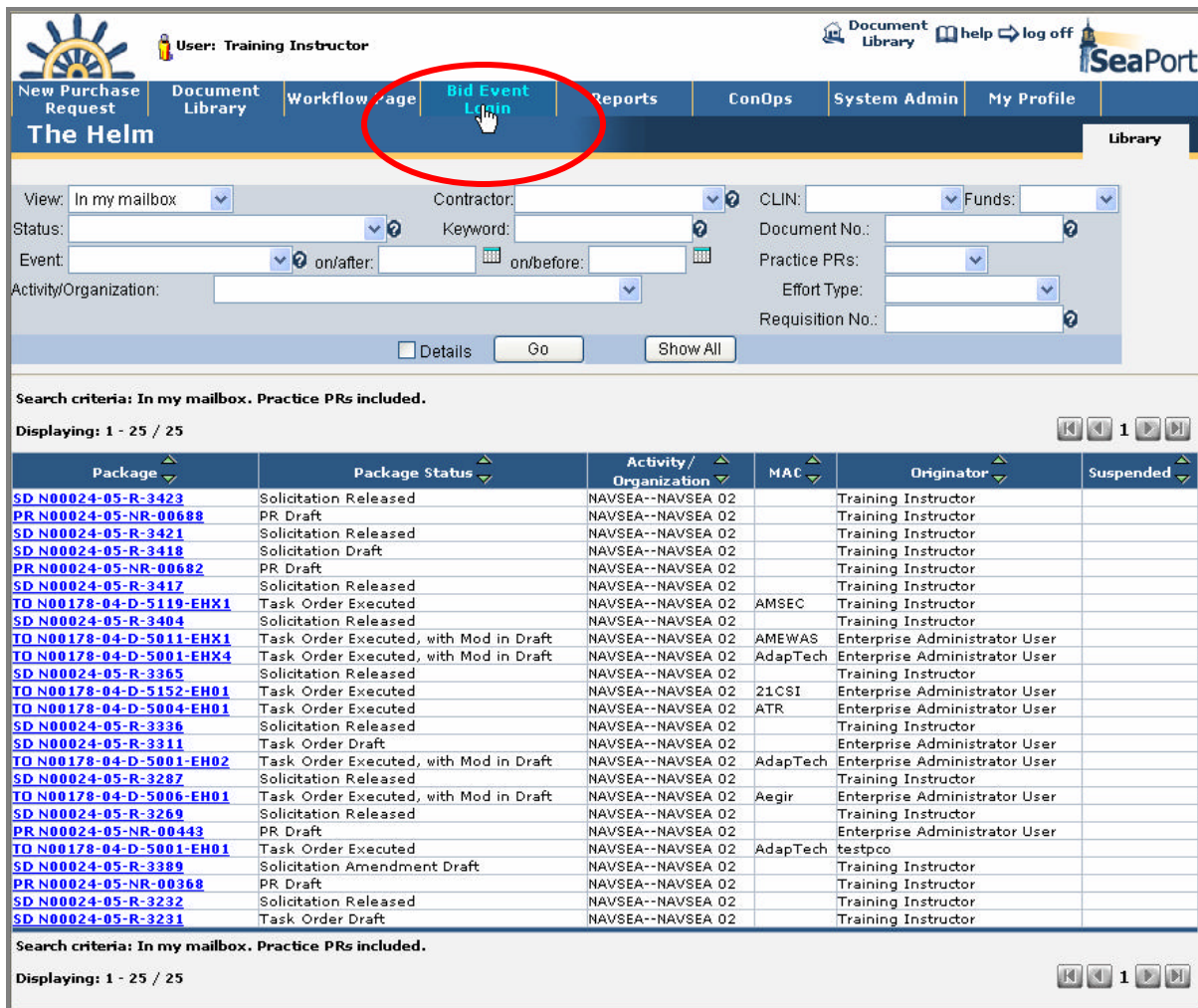
> 1.   From the SeaPort header navigation

2.   From the *Create Bid Event* button

1. Authorized users can login directly to the Bid Event System from SeaPort. Users with at least one of the aforementioned roles will see the *Bid Event Login* navigation in the header navigation bar, as shown in Figure 103.

Clicking on the *Bid Event Login* navigation will open a new window and log the user into the Bid Event System.

> **NOTE:**   This window will not interfere with the BuySite session, and may be closed at any time.

Figure 103: BE – Initial screen in SeaPort/BuySite (Document Library)

2. Users can also access the Bid Event System by using the *Create Bid Event* button. The *Create Bid Event* button is available when locking-and-releasing solicitations or from the Package Home page after a solicitation has been locked and released.

> **NOTE:**   NAVSEA users will only be able to login to the Bid Event System via these paths in SeaPort. That is, a NAVSEA user will not go to a "Bid Event System Login Page" as with the previous software.

4.2.14.2   Creating a Solicitation Bid Event

There are two ways to create a Bid Event associated with released solicitation:

- ✍   Immediately upon performing the Lock & Release Solicitation function
- ✍   After completing the Lock & Release function

When creating the bid event as part of the solicitation lock and release process, the PCO will be prompted to complete several additional steps to create the event and notify the vendor community. The user is guided through these steps by a wizard.

After performing the Lock and Release, a PCO could come back and create the event or could route the package to an associate (another PCO or an 1102) to create the event. There will be a *Create Bid Event* button available to users that have packages in the Solicitation Release state in their mailboxes. This button is visible on the Package Home page.

In either case, the steps necessary to create a Bid Event are identical.

4.2.14.2.1   Creating an event upon Lock & Release

The confirmation page the user sees upon locking and releasing a solicitation includes a summary of the activities that have just completed as well as two navigational options. As shown in Figure 104, the user may use the *Return To Form* button to be taken back to the Package Home Page or may select the "here" link to proceed to the Event Creation process.
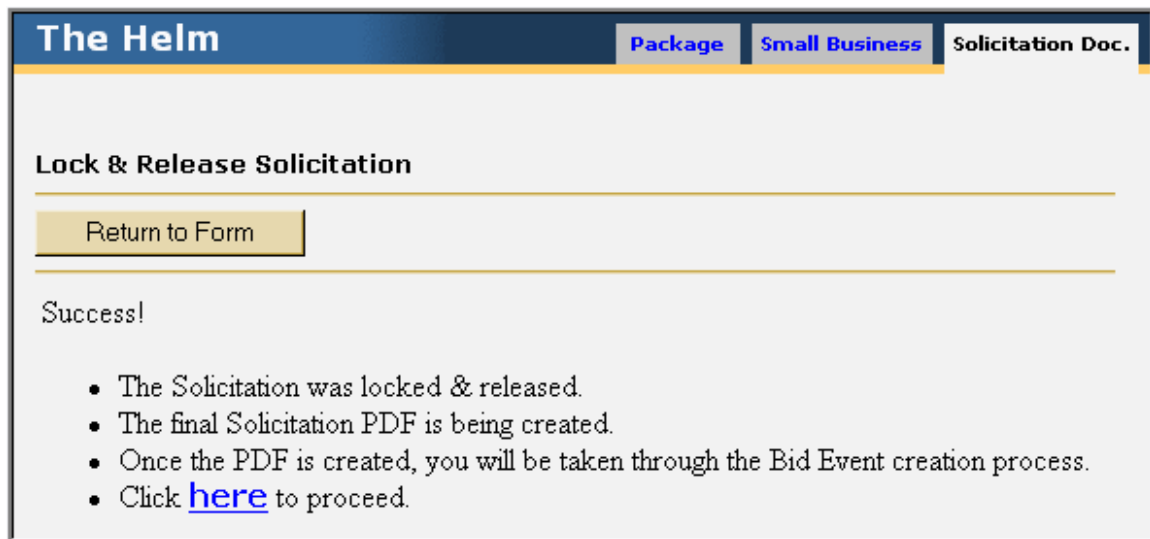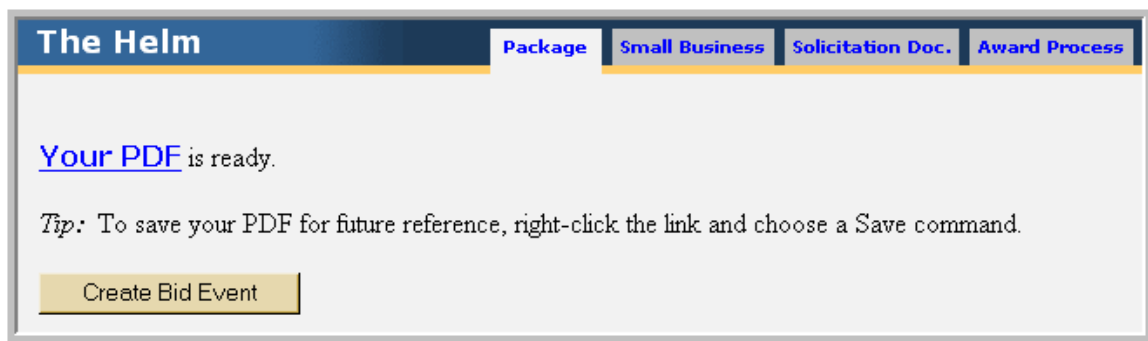
Figure 104: BE – Lock and Release Solicitation.

After selecting the "here" link in the previous page (and after the final solicitation PDF has been generated), the user is presented with the option to Create the Bid Event as shown in Figure 105.

TIP: The user can right-click and save the PDF to disk, if desired, or proceed directly the Bid Event Creation process
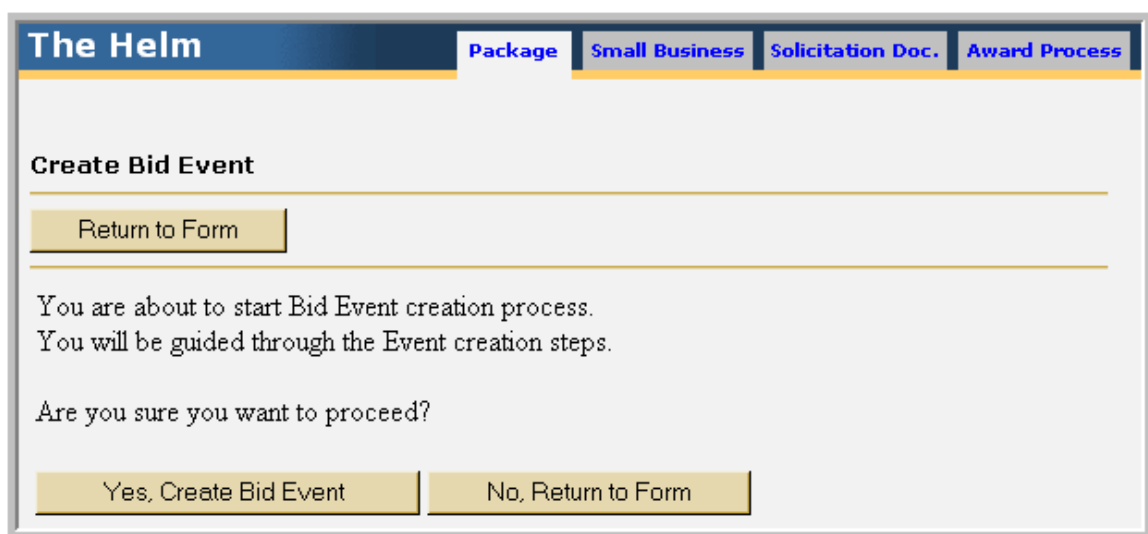
Figure 105: BE – Prompt for Bid Event Creation.

After selecting the *Create Bid Event* button the user is asked to verifying this selection, as shown in Figure 106.

Figure 106: BE – Verify Bid Event Creation.

If the user does not want to proceed at this point, he may select either of the *Return to Form* buttons to return to the Package View. Clicking on the *Yes, Create Bid Event* button, will open a new window, automatically log the user into the Bid Event System, and display the initial screen as shown in Figure 107.

The fields and buttons contained on this form are explained in Table 59 and Table 60 below. Step 1 contains administrative information about the bid event.
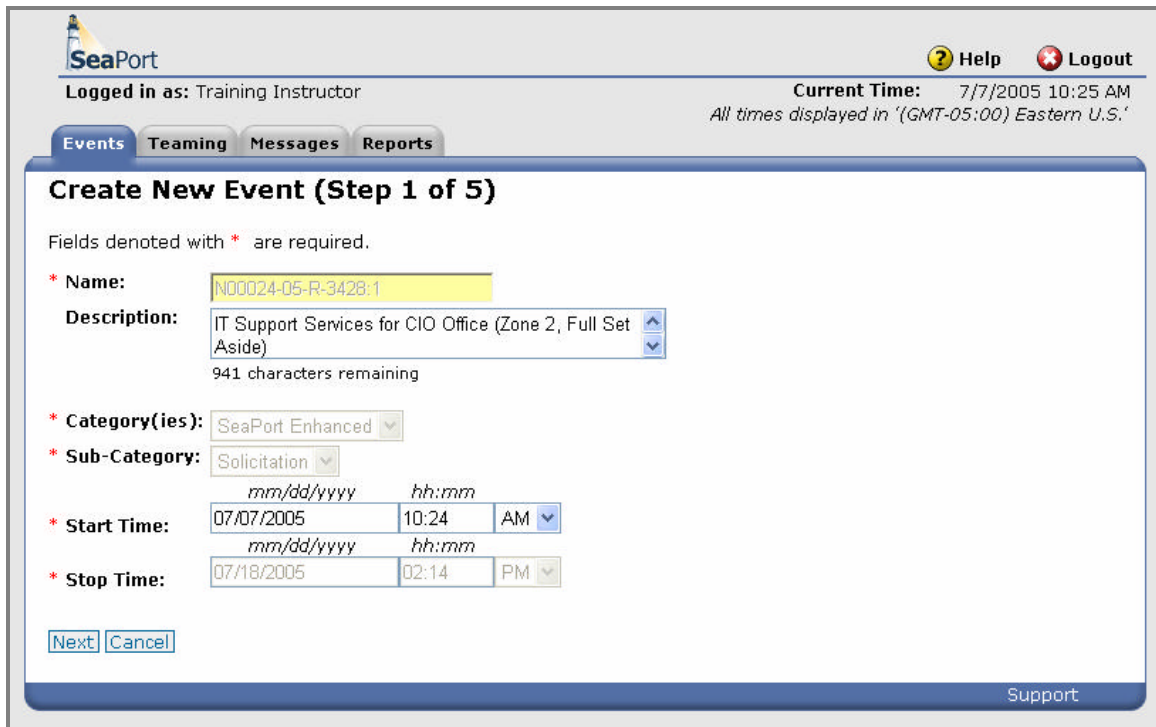
Table 59: Create Bid Event – Step 1 – Fields

Field	Type	Description
Name	Read Only	System-generated. The event name reflects the Solicitation Document (or amendment) name, number, and round ID (if applicable). It is not editable.

Field	Type	Description
Description	Text Box	The Description is pre-populated with the short description entered when the PR was created as well as the Zone of Performance and Set-aside Status (if applicable). It may be edited. **Note:** Do not delete/overwrite the zone and set-aside information (the information in the parenthesis).
Category(ies)	Read Only	System-generated. Reflects the contract type (SeaPort I, SeaPort Enhanced, or both). It is not editable.
Sub-Category	Read Only	System-generated. Always set to *Solicitation* for events created using the *Create Bid Event* button in SeaPort. **Note:** The sub-category field is purely informational and gives the vendors an easier way to filter and sort the event listing. It is not editable.
Start Time	Text Box	A default Start Time of 10 minutes from the time the Event Wizard was started is pre-filled on the form. This may be edited to suit your needs. Vendors will have the opportunity to bid on the Solicitation between the Start Time and Stop Time entered. This time should be entered in the user's local time zone (specified in upper right header area of screen). It must be a time in the future, but can be as few as just several minutes from current. Enter the Start Time for the event in "mm/dd/yyyy hh:mm" format.
Stop Time	Text Box	Pre-filled. The pre-filled entry is based on the Closing Date and Time entered on the Administrative Panel of the Solicitation Document. Pre-populated with the solicitation's closing time. It is not editable.

Table 60: Create Bid Event – Step 1 – Buttons

Button	Description
Next	Save the data and proceed to Step 2. Click *Next* when satisfied with the data entry.
Cancel	Cancels the Event Creation Wizard. A confirmation page is presented before cancellation is completed. This action can be aborted from the confirmation page.

Figure 107: BE – Create New Event (Solicitation, Step 1 of 5)

Step 2 of the wizard is shown in Figure 108. This step allows the user to review and/or delete the attachments that were automatically uploaded from BuySite, as well as add additional documents. The final Solicitation PDF has been uploaded automatically by the system.

Important: The user should carefully review all attachments to make certain that only appropriate and necessary attachments are included.

Note that any attachments added from the Bid Event System will not appear automatically back on the BuySite side.

The fields and buttons contained on this form are explained in Table 61 and Table 62 below.
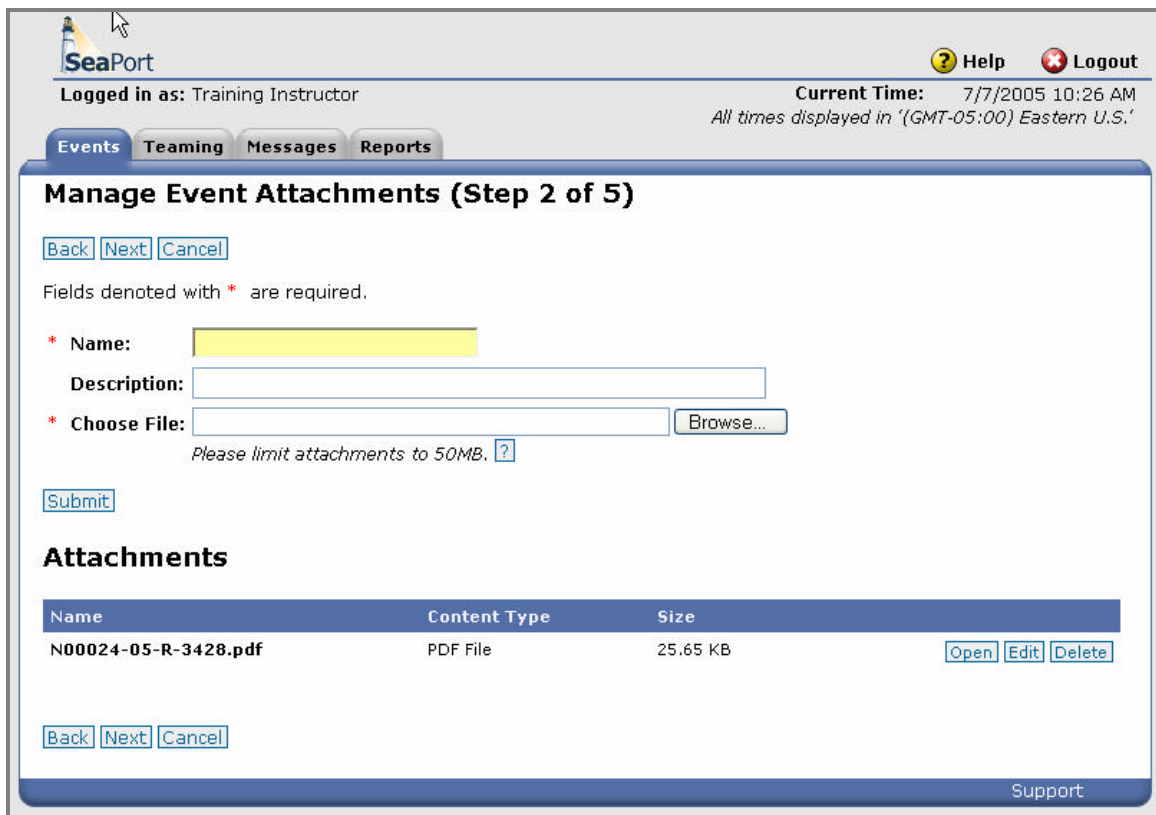
Table 61: Create Bid Event – Step 2 – Fields

Field	Type	Description
Name	Text Box	Enter a name to be displayed in the list of attachments.
Description	Text Box	Enter a short description.
Choose File	Text Box	Use the *Browse* button to navigate to a file or enter the complete path to the file here.

Table 62: Create Bid Event – Step 2 – Buttons

Button	Description
Back	Returns to the previous step.
Next	Save the data and proceed to Step 3. Click *Next* when satisfied with the data entry.

Button	Description
Cancel	Cancels the Event Creation Wizard. A confirmation page is presented before cancellation is completed. This action can be aborted from the confirmation page.
Browse…	Opens the Windows Choose File dialog. Browse your computer, network resources, or removable media for a file.
?	Large attachments may take several minutes to upload. Please do not interrupt the process after the 'Submit' button has been activated.
Submit	Uploads the file. Adds the selected file to the list of attachments.
Open	Opens the file or downloads it to your computer depending on your browser settings.
Edit	Edit the Name and Description.
Delete	Delete the attachment.

Figure 108: BE – Manage Event Attachments (Solicitation, Step 2 of 5)

Step 3 of the wizard is shown in Figure 109. This step allows the user to review the invited bid groups and users that were automatically pre-selected from SeaPort. Currently, these selections are not editable. SeaPort I solicitations will automatically be issued to All SeaPort I Primes and Subcontractors. SeaPort Enhanced solicitations will automatically be issued to
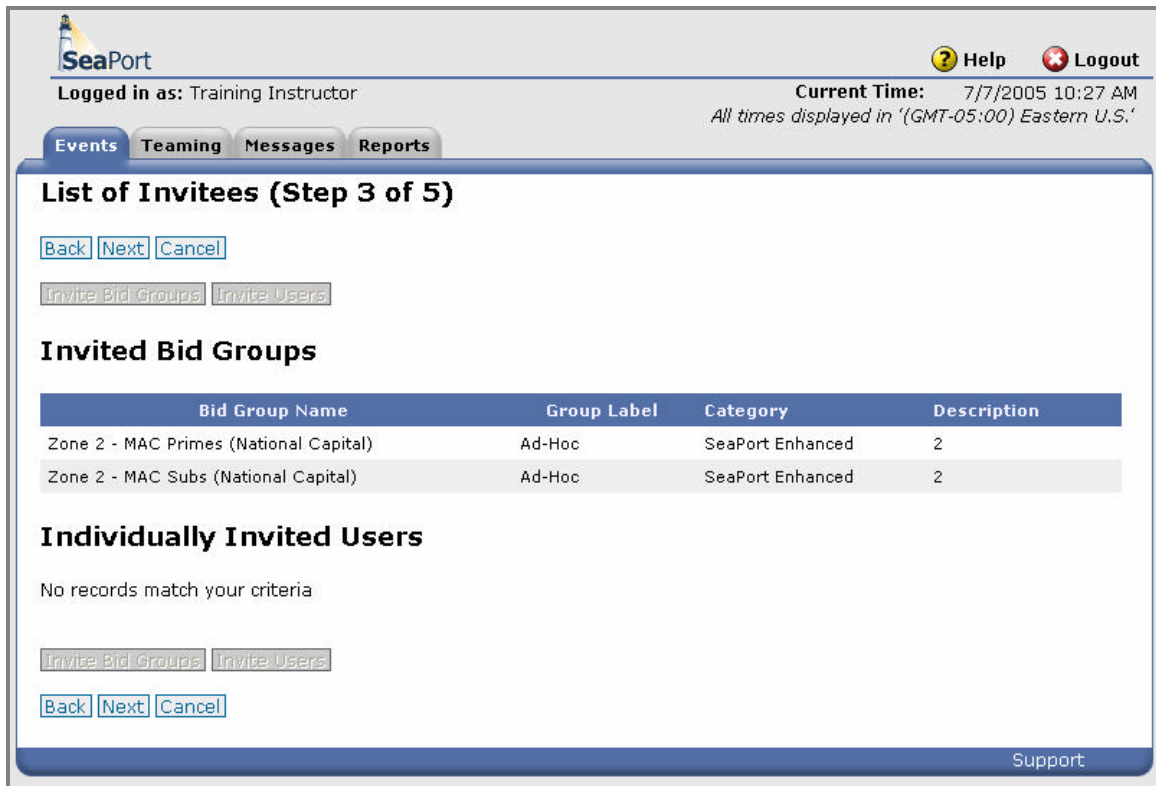
the Prime and Sub group for the appropriate zone of performance. Invitees can be edited if a Down Select is made for an amendment or additional round.

> **NOTE:**   Per direction from the SeaPort office, if a user has a need to send a solicitation to other than the default specified groups, that user should contact NAVSEA Support.

The fields and buttons contained on this form are explained in Table 63 below.

Table 63: Create Bid Event – Step 3 – Buttons

Button	Description
Back	Returns to the previous step.
Next	Save the data and proceed to Step 4. Click *Next* after reviewing the data entered.
Cancel	Cancels the Event Creation Wizard. A confirmation page is presented before cancellation is completed. This action can be aborted from the confirmation page.
Invite Bid Groups	SeaPort Enhanced solicitations will automatically be issued to the Prime and Sub group for the appropriate zone of performance. This is not editable.
Invite Users	No individual users are selected. This is not editable.

Figure 109: BE – List of Invitees (Solicitation, Step 3 of 5)

Step 4 of the wizard is shown in Figure 110. This step allows the user to review all of the event details and confirm the correct attachments.

The fields and buttons contained on this form are explained in Table 64 below.

Table 64: Create Bid Event – Step 4 – Buttons

Button	Description
Back	Returns to the previous step.
Next	Save the data and proceed to Step 5. Click *Next* when satisfied with the data entry.
Cancel	Cancels the Event Creation Wizard. A confirmation page is presented before cancellation is completed. This action can be aborted from the confirmation page.
Download All	Downloads all attachments in the list to your computer as a zip file.
Open	Opens the file or downloads it to your computer depending on your browser settings.
Edit	Edit the Name and Description.
Delete	Deletes the attachment.

Figure 110: BE – View Event Details (Solicitation, Step 4 of 5)

Step 5 of the wizard is shown in Figure 111. This step allows the user to construct and preview the invitation message that is sent to the users selected in Step 3.

The fields and buttons contained on this form are explained in Table 65 and Table 66 below.

Table 65: Create Bid Event – Step 5 – Fields

Field	Type	Description

Field	Type	Description
Send Copy to Creator	Check Box	Clicking on the *Send Copy To Creator* checkbox (enabling it) will send a copy of the message to the e-mail address associated with the user creating the event. This is recommended and is the default choice.
Message Type	Dropdown	This field is not editable. By default, all messages issued for events created by clicking the *Create Bid Event* button in SeaPort/BuySite are of type "invitation". The message type specifies the message template that is used. The other message types (Update, Extension, and Cancellation) are described in Section 4.2.14.3.

Additional Message	Text Box	Additional message text may be entered here. Suggested information to add here includes:
		
		  ✇ Indication of point-of-contact and contact information
		
		  ✇ Any other pertinent information to share about the requirement (beyond what appears in the description)
		
		It is not necessary to enter information about the offer period, solicitation name, or zone/set-aside status (if applicable), as that information is presented by the message template.

Table 66: Create Bid Event – Step 5 – Buttons

Button	Description
Refresh Preview	Refreshes the Message Preview section of the page. Changes made are reflected here.
Send Message	Click the *Send Message* button to send the message to the invitees and complete the event creation process.
Back	Return to the previous step.
Cancel	Cancels the Event Creation Wizard. A confirmation page is presented before cancellation is completed. This action can be aborted from the confirmation page.

Figure 111: BE – Send Event Message (Solicitation, Step 5 of 5)

After sending the message, the user will be taken to the Event Listing screen, as shown in Figure 112. This screen displays Bid Events and the following information about them: Event Name, Category, Sub-Category, Status, Stop Time, Q&A, and Total Bids. This list can be filtered by Event Name, Category, Sub-Category, or Status. After locating an event in the list, the user can view the details about that event.

Table 67: Create Bid Event – Event Listing – Fields

Field	Type	Description

Field	Type	Description
Event Name	Text Box	Enter an event name or a partial event name. Wildcard characters may be entered (*).
Category	Dropdown	Choose from SeaPort Enhanced or SeaPort I.
Sub-Category	Dropdown	Choose from Task Order/Mod, Solicitation, Advance Notice/Draft, Award Report, or Other.
Status	Dropdown	Choose from Current, Past, Future, Cancelled, or Incomplete. **Note:** Incomplete is only available to users who can create events.

Table 68: Create Bid Event – Event Listing – Buttons

Button	Description
Create New Event	Start the Create New Event wizard – Step 1.
	The Events list can be sorted in ascending or descending order by Event Name, Stop Time, or Total Bids using the up and down arrows in the column headers.
?	You can filter the list of events by status: Current: Events that are open - you can place bids now. Past: Events that are closed - you cannot place bids anymore. Future: Upcoming events that are scheduled, but have not yet started. Cancelled: Events that have been cancelled - you cannot place bids anymore. Incomplete: Events that have not yet been submitted. **Note:** Incomplete is only available to users who can create events.
Filter	Only show results that match the filter criteria selected.
Show All	Show all events. (Remove filters)
Previous	If the list extends beyond one page, this link takes you to the previous page.
Next	If the list extends beyond one page, this link takes you to the next page.
View Details	View the Event Details page shown in Figure 113 below.
Cancel Event	Cancels the Event. A confirmation page is presented before cancellation is completed. This action can be aborted from the confirmation page.

Figure 112: BE – Event Listing View

AQUILENT

SeaPort

❓ Help   ⊗ Logout

Logged in as: Training Instructor

Current Time: 7/7/2005 10:32 AM
All times displayed in '(GMT-05:00) Eastern U.S.'

Events   Teaming   Messages   Reports

View Event Details

Name:	N00024-05-R-3428:1
Description:	IT Support Services for CIO Office (Zone 2, Full Set Aside)

Creator:	Training Instructor
Category(ies):	SeaPort Enhanced
Sub-Category:	Solicitation
Status:	Future

Questions:	0
Answers:	0

Start Time:	7/7/2005 10:24 PM
Stop Time:	7/18/2005 2:14 PM
Time Left:	N/A

Total Prime Bids: 0

Edit Back

Manage Attachments Invitees Cancel Event Send Message View Messages Questions & Answers

Event Attachments

Name	Content Type	Size	
N00024-05-R-3428.pdf	PDF File	25.65 KB	Open

Download All

Invited Bid Groups

Bid Group Name	Group Label	Category	Description
Zone 2 - MAC Primes (National Capital)	Ad-Hoc	SeaPort Enhanced	2
Zone 2 - MAC Subs (National Capital)	Ad-Hoc	SeaPort Enhanced	2

Individually Invited Users

No users were invited to this event

Bids

Bidder	Prime Company	Amount	Date Submitted

No bids have been submitted

Teaming Partner Bids

Bidder	Company	Prime Company	Date Submitted

No bids have been submitted
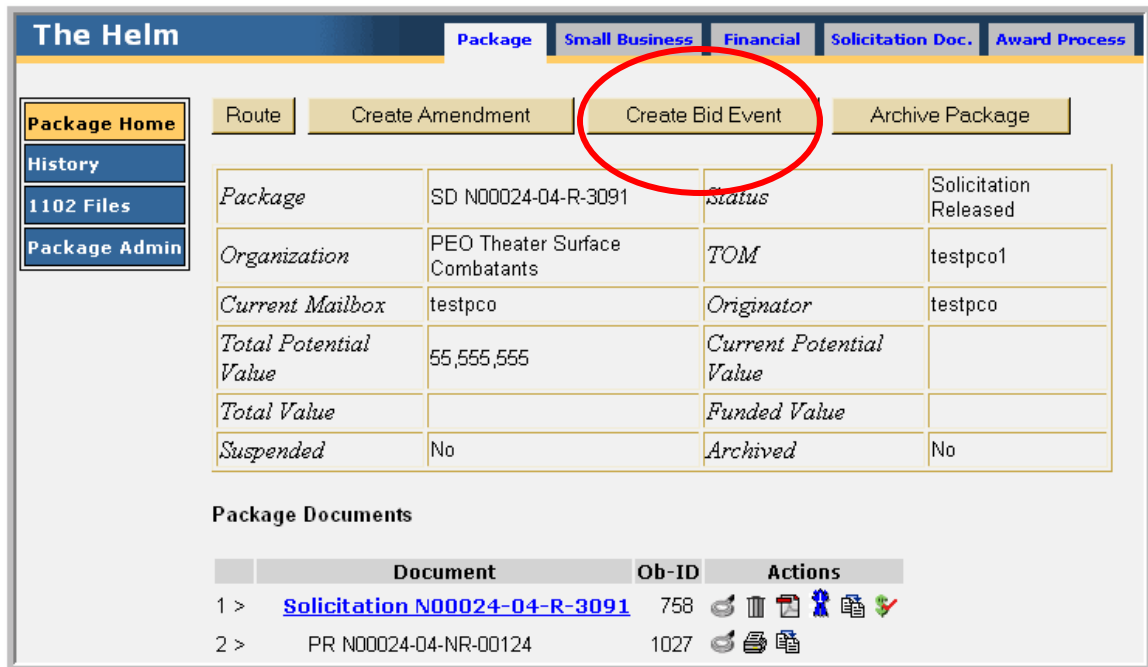
Back

Support

Figure 113: BE – View Event Details

4.2.14.2.2 Creating an event at some future point after Lock & Release

If the user elected not to continue with the Bid Event Creation steps immediately after locking and releasing the solicitation, he can still do so from the Package Home page. On the Package Home page, shown in Figure 114, there is a *Create Bid Event* button. This button appears for any released solicitation that is in the PCO, 1102, or Administrator's mailbox. In this way, a PCO could lock and release a solicitation, and then route the package back to the 1102 to create the bid event.

Figure 114: BE – Create Bid Event from Package View

Selecting the *Create Bid Event* button opens a new window and automatically logs the user into the Bid Event System.

> **NOTE:** Should a user attempt to create a Bid Event for a solicitation that is named the same as an existing event, the warning/error message shown in Figure 115 appears.
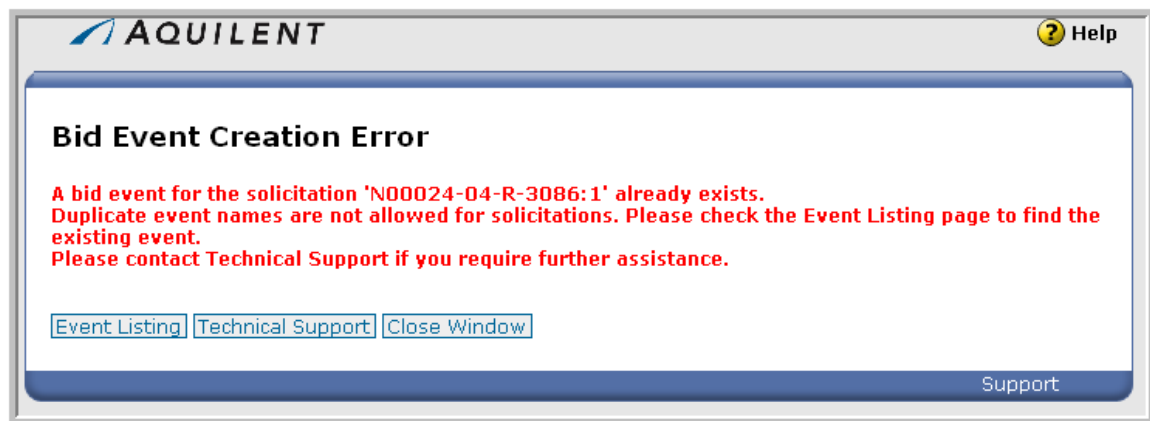
Figure 115: BE – Duplicate Event Error Message

From this point, the process is identical to that described in Steps 1 – 5 under 4.2.14.2.1 "Creating an event upon Lock & Release" above.
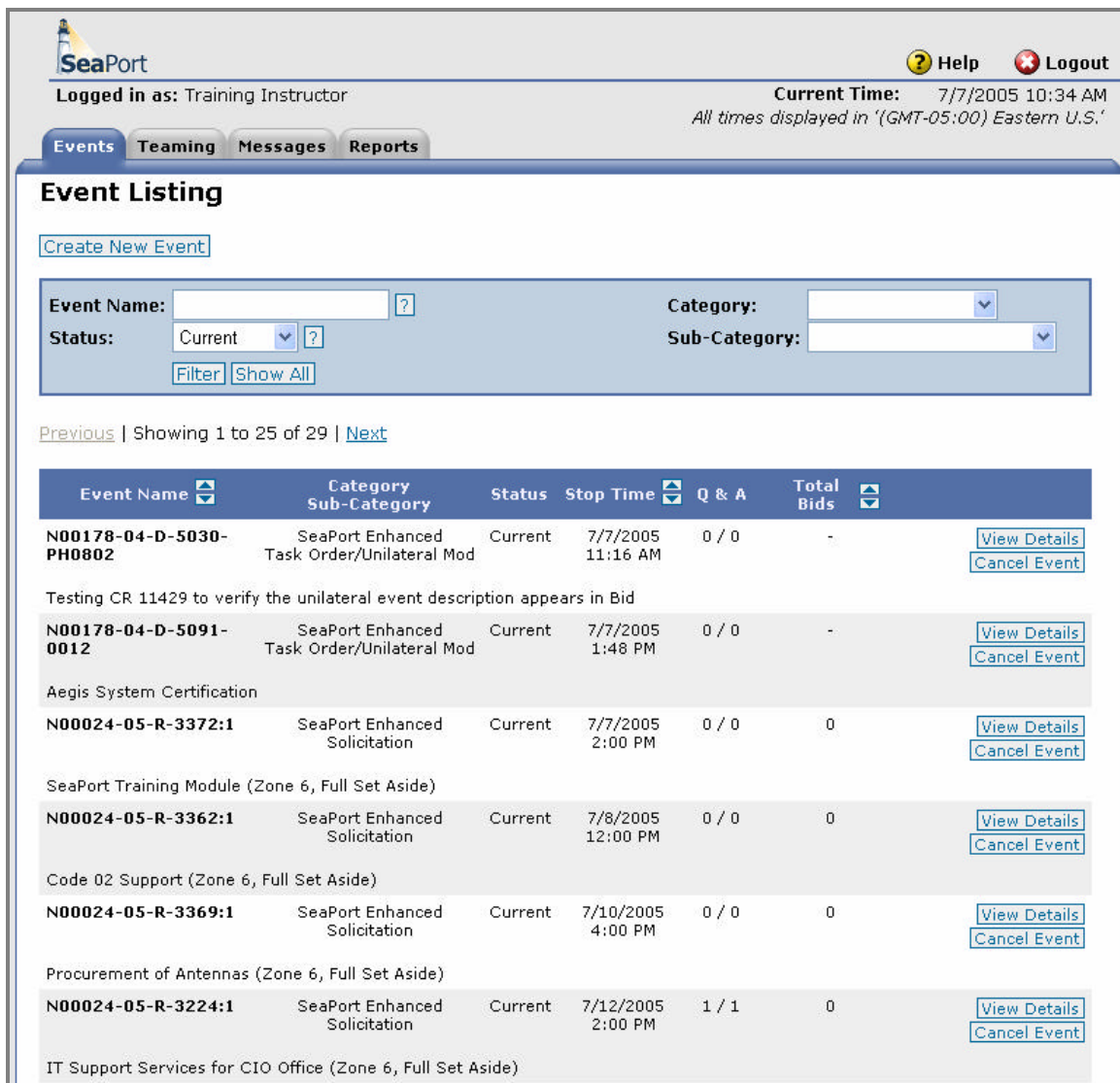
4.2.14.3 Creating a non-Solicitation Event

In addition to Solicitation Events, a user may need to create events that are not associated with an individual solicitation. These may include:

- Pre-announcements/draft RFQs
- Any other type of communication desired for broadcast to the vendor community

In order to create non-solicitation events, the user must login to the Bid Event System through the *Bid Event Login* menu choice described in Section 4.2.14.1, "Accessing the Bid Event System".

Clicking on the *Bid Event Login* navigation will open a new window and log the user into the Bid Event System, as shown in Figure 116. The user will initially see the list of current ("open") events.

Figure 116: BE – Default Bid Event System view

Clicking on the *Create New Event* button opens the Create New Event wizard screen shown in Figure 117. The series of steps involved with creating non-solicitation events is identical to that associated with creating solicitation events, with several minor differences as outlined in the following step descriptions.

Figure 117: BE – Create New Event (Non-Solicitation, Step 1 of 5)

In Step 1 for non-solicitations (shown in Figure 117 and Figure 118), the same kind of information is entered, but only the Start Time is pre-populated. All fields are editable. The user may now choose the Event Category (SeaPort I, SeaPort Enhanced, or both) and the Event Sub-Category (Advance Notice/Draft and Other). The user may also enter both the Start Time and the Stop Time for the Event.
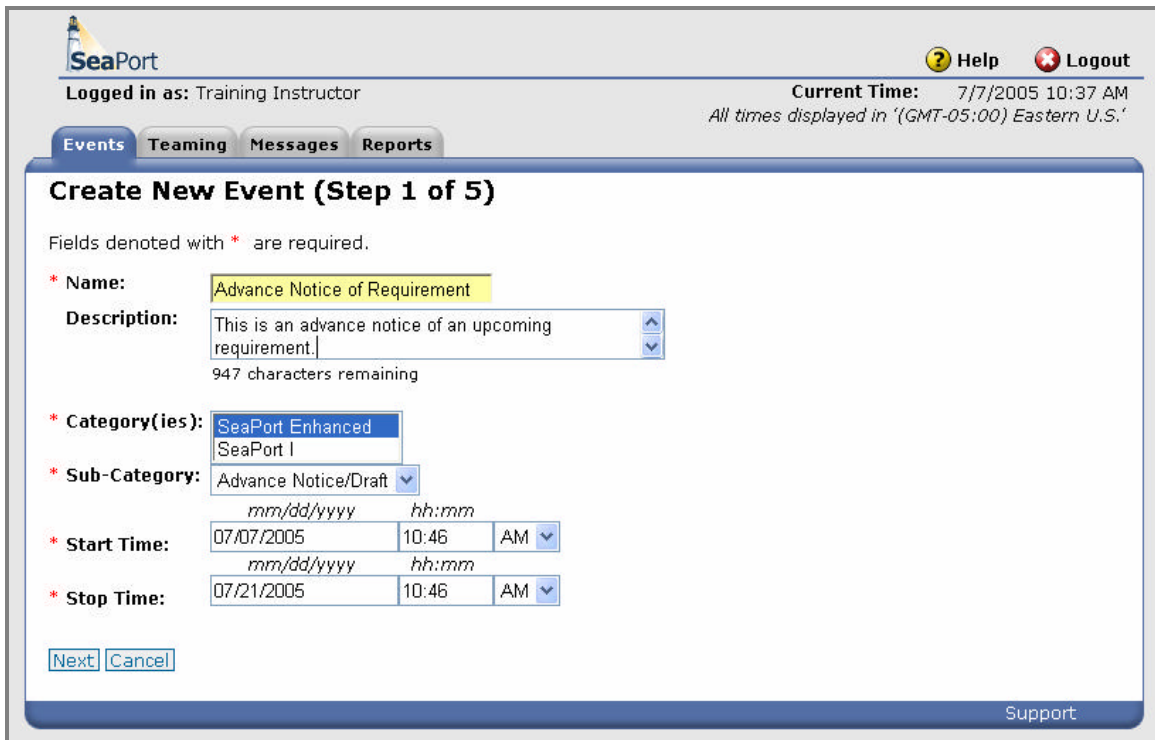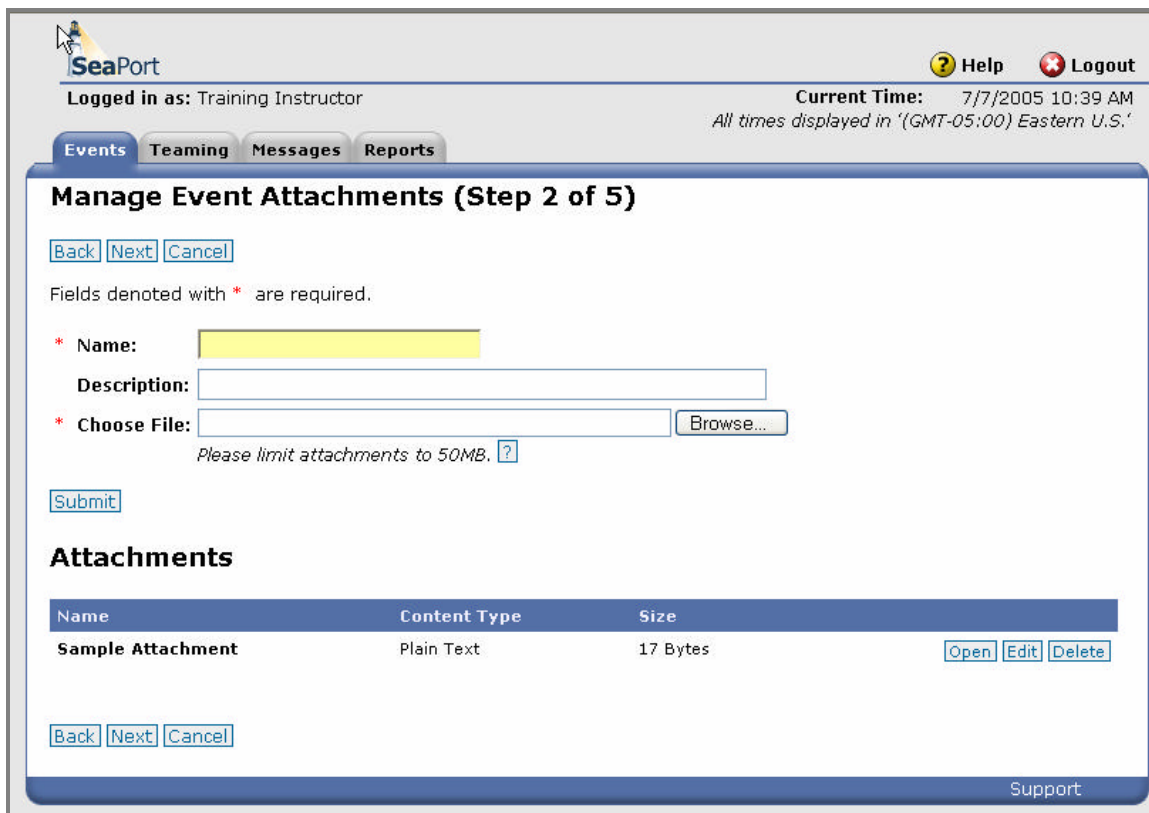
Figure 118: BE – Create New Event (Non-Solicitation, Step 1 of 5) - completed

In Step 2 of the wizard (shown in Figure 119), the user may upload relevant attachments (refer to Figure 108). Files on the local or network file system may be added. The user can provide a descriptive name and (optional) detailed description of the file contents.

Figure 119: BE – Manage Event Attachments (Non-Solicitation, Step 2 of 5)

Step 3 of the wizard is shown in Figure 120. This step allows the user to select the invited bid groups and users that will be able to access the event. The same selections will be used in Step 5 when the message is sent. Click on the *Invite Bid Groups* button to bring up the Bid Groups Selection screen (Figure 121) or the *Invite Users* button to bring up the User Selection screen (Figure 122). Both Bid Groups and individual users may be added to the same Event.

Figure 120: BE – List of Invitees (Non-Solicitation, Step 3 of 5)

Filtering a long list may help you to find the Groups you wish to invite to the Event. Filtering criteria may be combined to further narrow the list.

The Bid Groups list may be filtered by the following criteria:

- Bid Group Name
- Group Label
- Category

The Users list may be filtered by the following criteria:

- UserName
- First Name
- Last Name
- E-Mail
- Company
- Security Group

- Password Never Expires
- Active
- Locked
- Include Only User Type
- Exclude user Type

Figure 121: BE – Select Bid Groups (Non-Solicitation, Step 3 of 5)   **Figure 122: BE – Select Users (Non-Solicitation, Step 3 of 5)**

When the appropriate bidders/bid groups have been added the screen will appear as in Figure 123.

Figure 123: BE – List of Invitees (Non-Solicitation, Step 3 of 5, completed)

Step 4 of the wizard is shown in Figure 124. This step allows the user to review all of the event details and confirm the correct attachments.

Figure 124: BE – View Event Details (Non-Solicitation, Step 4 of 5)

Step 5 of the wizard is shown in Figure 125. This step allows the user to construct and preview the invitation message that is sent to the users selected during Step 3. The functionality of this page is the same as is described in Section 4.2.14.2, Creating a Solicitation Bid Event.

After the message is sent the user is returned to the Event Listing page.

Figure 125: BE – Send Event Message (Non-Solicitation, Step 5 of 5)

4.2.15   Award Determination

The Award Process (AP) information and options displayed vary depending upon your SeaPort role.   The information and the screen images below represent users with various roles in the system.   This was necessary in order to illustrate complete system functionality. Table 69 below illustrates the steps a standard award process follows:

Note that non-evaluators who require access to the Award Determination information must be added via the Advisors panel.

Table 69: Award Process - Workflow

Step	What	Who	Where
1	Solicitation is released	PCO	SeaPort Solicitation Document Tab
2	Bid Event is created and opens	Bid Event Creator	Bid (Government Side)
3	Vendors submit bids	MAC Contractors	Bid (Vendor Side)
4	Bid Event closes	System event (based on date/time entered when bid event created)	Bid (bid data is transferred into SeaPort)
5	Evaluate Bid Attachments	PCO	SeaPort Award Process Tab
6	Open Round for evaluations	PCO	SeaPort Award Process Tab
7	Submit Evaluations	Evaluators	SeaPort Award Process Tab Evaluate Tab
8	Review Evaluations	Evaluation Chairman	SeaPort Award Process Tab Evaluation Summary Tab
9	Create Evaluation Summary	Evaluation Chairman	SeaPort Award Process Tab Evaluation Summary Tab
10	Submit Evaluation Summary	Evaluation Chairman	SeaPort Award Process Tab Evaluation Summary Tab
11	Recommend Winner	Evaluation Chairman	SeaPort Award Process Tab Select Winner Tab
12	Create Another Round (judgment call)	PCO	SeaPort Award Process Tab Select Winner Tab
13	Create Task Order	PCO	SeaPort Award Process Tab Select Winner Tab

4.2.15.1 Award Process Tab

Only the Evaluate tab is available to those users designated as evaluators on the solicitation document. The Chairman and PCO's view will default to Evaluation Summary tab.
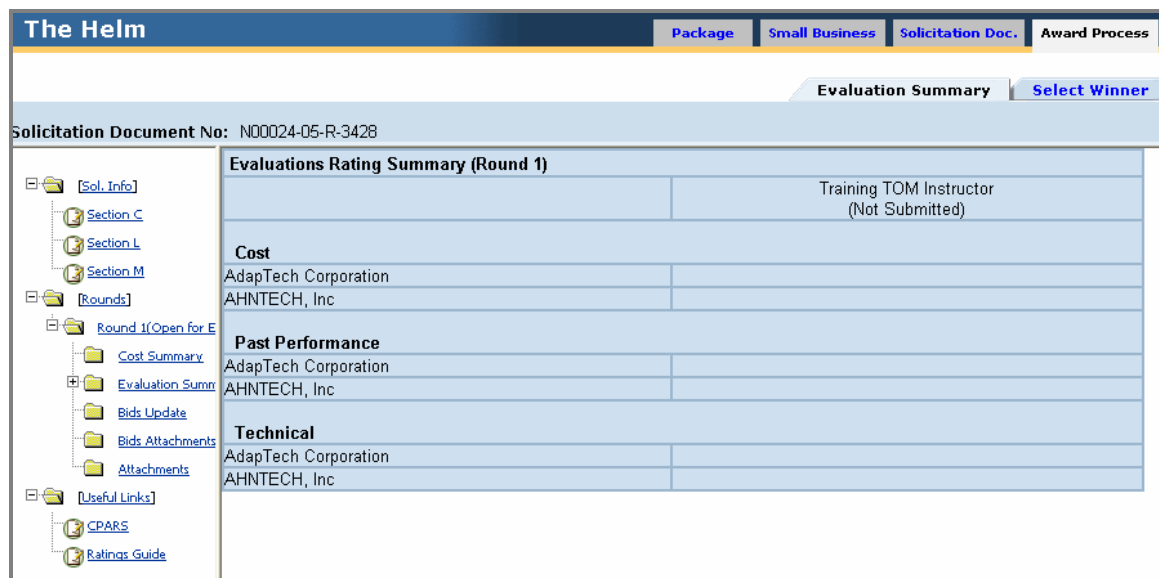
The other tab available to the PCO and the Chairman is Select Winner. Figure 126 illustrates the Award Process tabs available to a chairman or a PCO.

> **NOTE:** If the Chairman or PCO was selected to perform an individual evaluation, the Evaluate tab would also be visible.

4.2.15.2 Evaluation Summary Tab

The Evaluation Summary Tab main section defaults to an Evaluations Rating Summary that shows each contractor who submitted a bid for this round, name of each evaluator, and the evaluation rating, if completed.
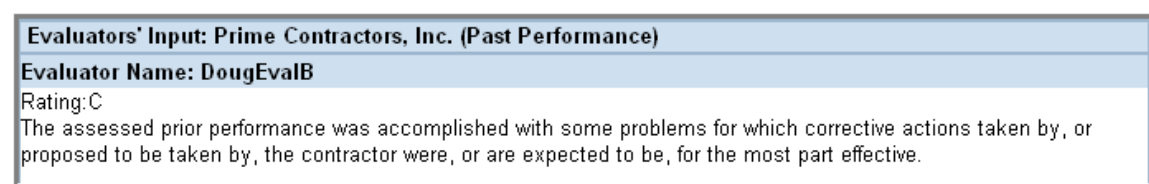
There is an indicator next to evaluator's name showing whether or not the evaluation was submitted. If the evaluator has submitted the evaluation, a Chairman has the ability to unlock the evaluation by pressing the *Unlock* button below that evaluator's name. This action will allow the evaluator to resume working on the evaluation or to perform necessary changes.

Figure 126: Award Determination – Evaluation Summary Tab

Next to each rating is an ellipse (…) link that, when clicked, displays the evaluator's comments for that rating. These comments are displayed in a pop up window as pictured in Figure 127.

Figure 127: Award Determination – View Evaluator's Input

4.2.15.3 Left Navigation Tree

The navigation tree that appears on the left of the Evaluation Summary tab contains folders and document links used for navigating the Award Process screens. The tree is shown in Figure 128 below.
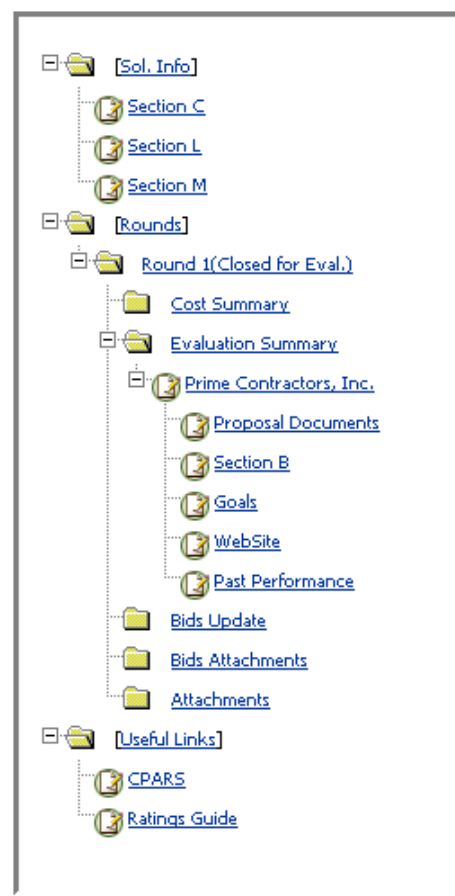
Figure 128: Award Determination – Site Navigation Tree

The SeaPort navigation tree is made up of folders and document links. A folder is a container that holds other folders or document links and is used to organize information in a meaningful way.

A folder can be either opened or closed:

To open a folder, click the plus (+) symbol to the left of the closed folder icon.
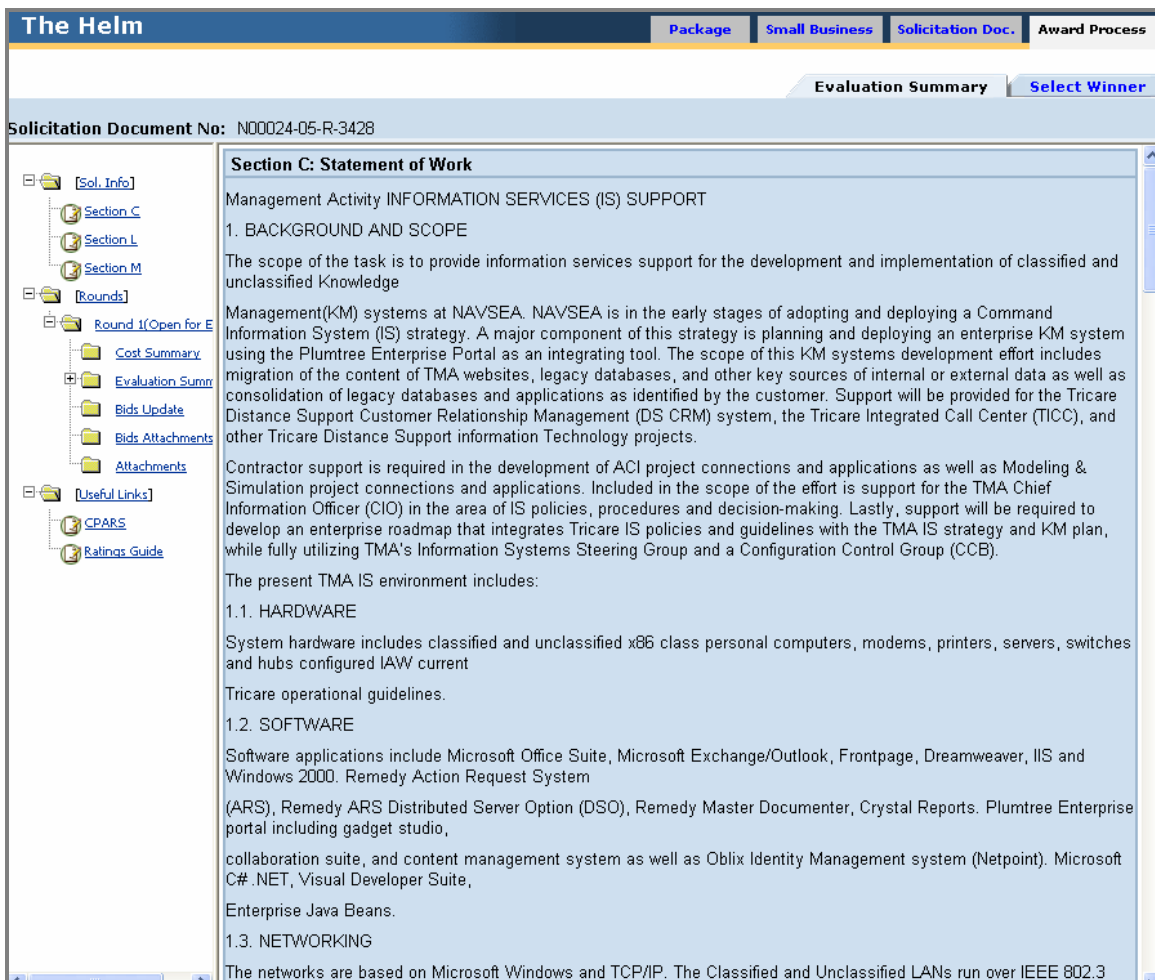
To close a folder, click the minus (-) sign to the left of the opened folder icon.

A document link is used to display portal information and is represented as this type of icon

followed by the link name. When a document link is clicked, information is displayed either in the payload area or in a separate browser window.

The left navigation contains three main folders: Sol. Info, Rounds, and Useful Links.

4.2.15.4 Solicitation Information (Sol. Info)

Click this link to display, in total, the Statement of Work (Section C), Instructions to Offerors (Section L), and Evaluation Criteria (Section M).

Figure 129: Award Determination – Solicitation Info

Beneath this folder, you can click on individual document links to display that specific section. In Figure 130 below, Section M is selected.
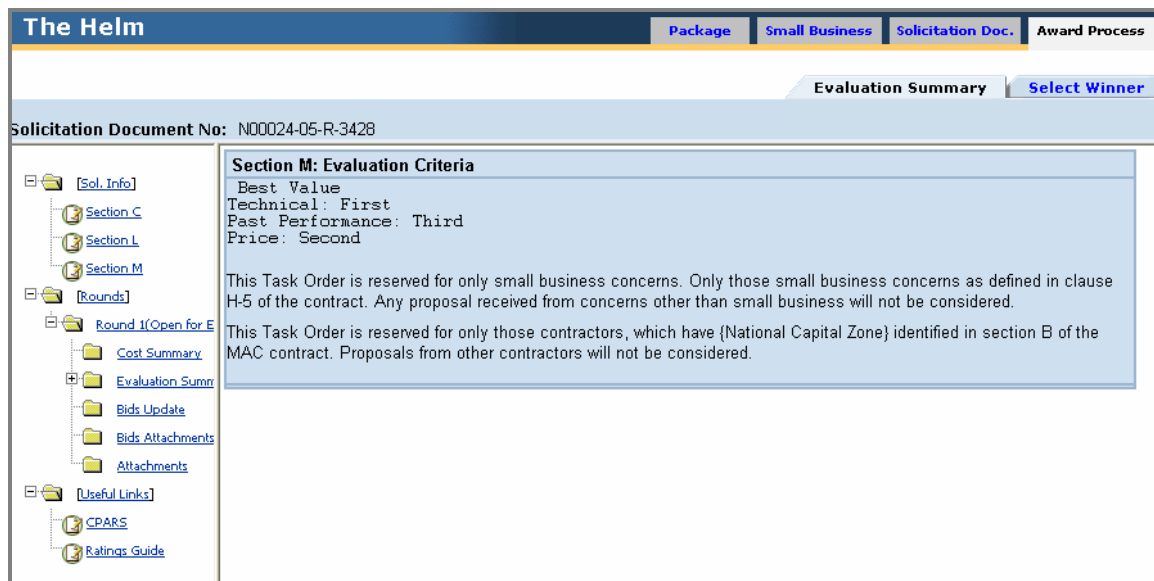
Figure 130: Award Determination – Section M Details

4.2.15.5 Rounds

There may be just a single round of bidding or there may be multiple rounds. This folder provides links to individual MAC contractor evaluations by bidding round. Round 1 will list the name of all MAC contractors that submitted proposals during the initial round. Each additional round will contain only the name of the MAC contractors who were selected and submitted proposals for that particular round. Each bidding round will be shown as a separate entry under the Rounds folder. Each round contains information about contractor ratings and evaluations. Round status (whether or not it's open for evaluation) can be found in the parenthesis next to the round number.

The folder structure for the Rounds folder is: Cost Summary, Evaluation Summary, Bids Update, Bids Attachments, and Attachments. These are all of the available folders. Some folders are not displayed to all users. This is controlled by your SeaPort role.

4.2.15.5.1 Cost Summary

This link provides readout of all contractors' bid totals for this round. Click a contractor name link to display a detailed CLIN/SLIN breakdown for the summary cost/price data. In Figure 131 has selected the Cost Summary link from the left navigation tree.

Figure 131: Award Determination – Cost Summary

4.2.15.5.2 Evaluation Summary

Beneath each round is an Evaluation Summary folder that contains a document link for each MAC contractor that submitted a proposal (for that round). The Evaluation Summary folder may be expanded to display the folder structure illustrated in Figure 132 below. For each contractor there are six links: Proposal Documents, Section B, Goals, Subcontracting Plan, WebSite, and Past Performance.

NOTE: Other than the PCO and the Evaluation Chairman, only Cost Evaluators will have access to the Section B information.
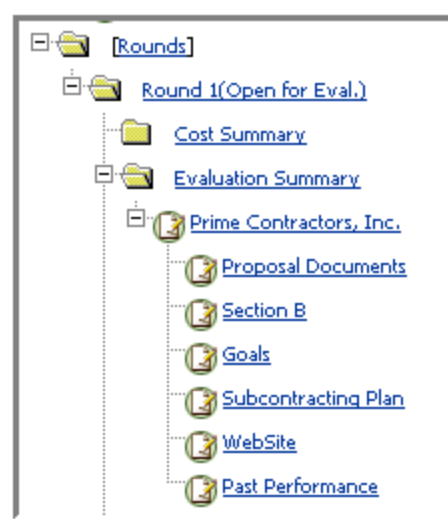
Figure 132: Award Determination – Evaluation Summary – Folder Structure

Clicking a contractor's name link displays a screen where the Evaluation Chairman can enter his summary comments. The Evaluation Chair Summary page is shown in Figure 133 below. This page contains the following buttons and links.

Table 70: Award Determination – Evaluation Summary – Buttons and Links

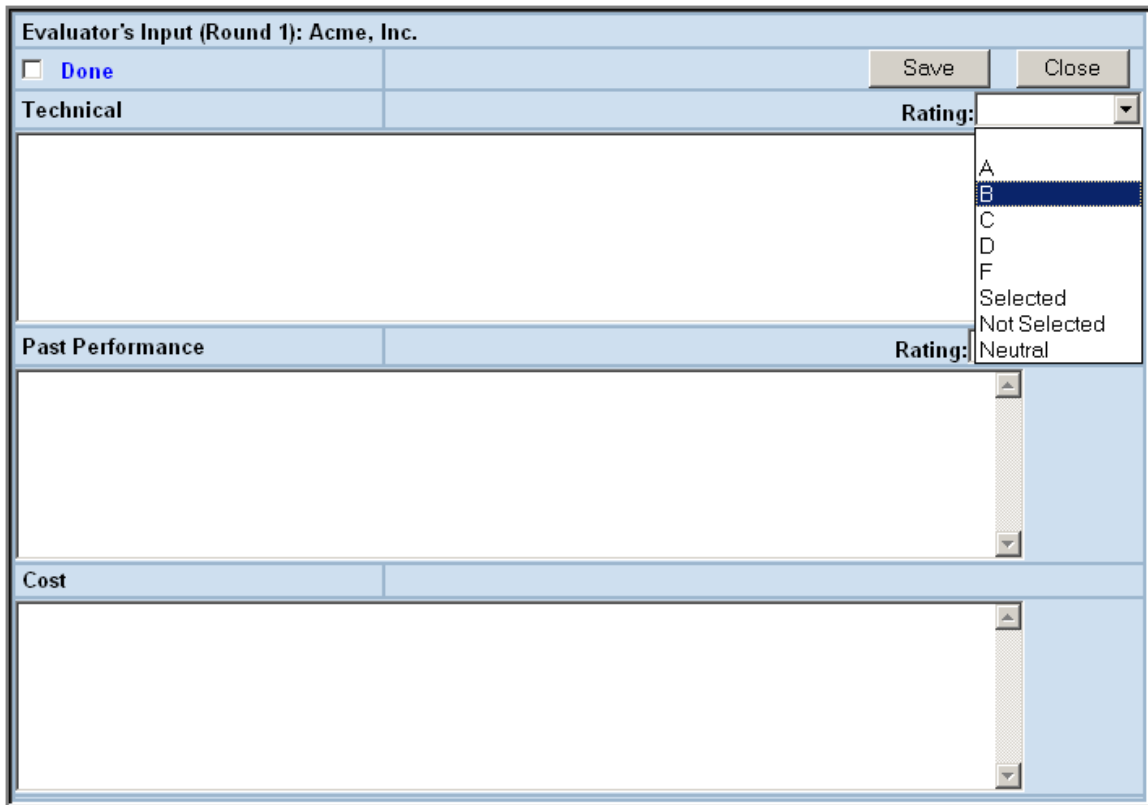| Control	Type	Description
View Evaluator's Input	Link	Click these links to see the comments and ratings submitted by the individual evaluators.
Fill with Inputs	Button	Clicking this button will automatically fill the section comment with corresponding evaluators' comments. As shown in Figure 133.
Rating	Dropdown	Use the Rating drop-down menu to select the overall rating for each rated area.
Save	Button	Click the *Save* button to save any additions or changes to the database. **Note:** Only the Chairman has the ability to save the summary.
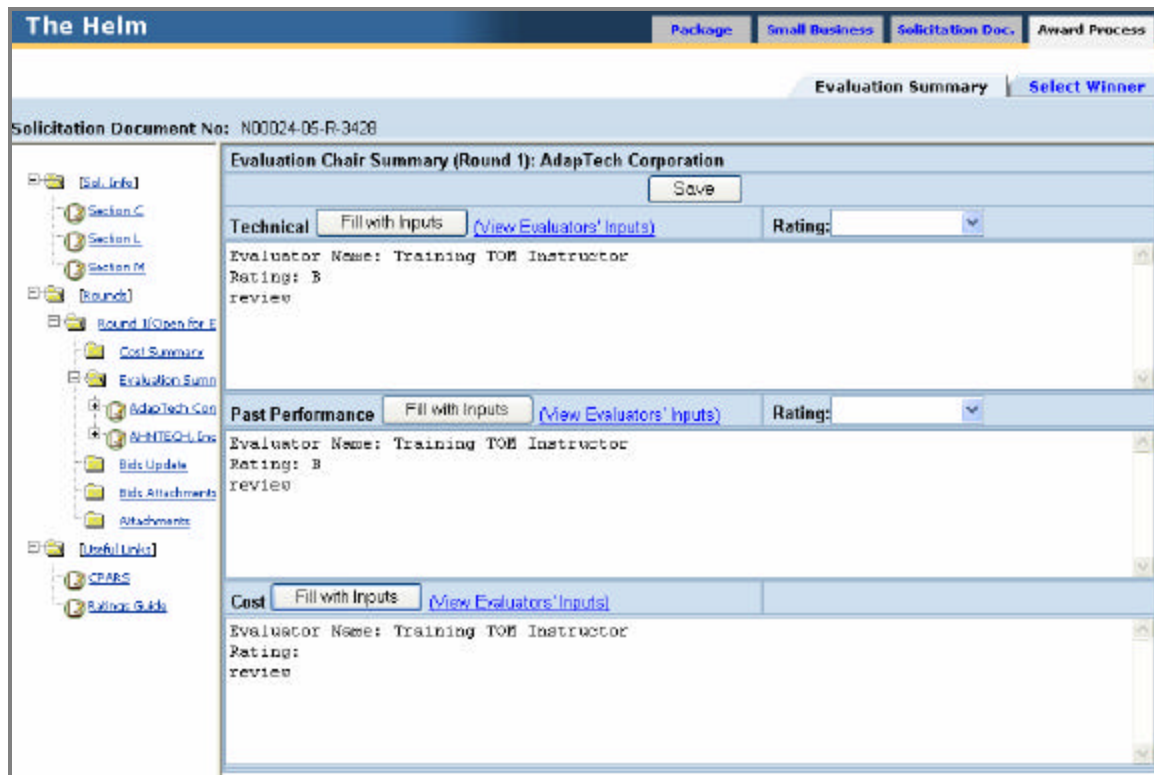
Figure 133: Award Determination – Evaluation Chair Summary

To assist in preparing an evaluation, there are a number of additional documents and links available when you expand the navigation tree under each contractor. These links include

Proposal Documents, Section B, Goals, Subcontracting Plan, WebSite, and Past Performance.

4.2.15.5.3 Proposal Documents

Click this link to display a window listing the name of each proposal section, volume, or other attachments submitted by the contractor. Click on the name of the document to display it in its native file format. The Proposal Documents page is shown in Figure 134 below.
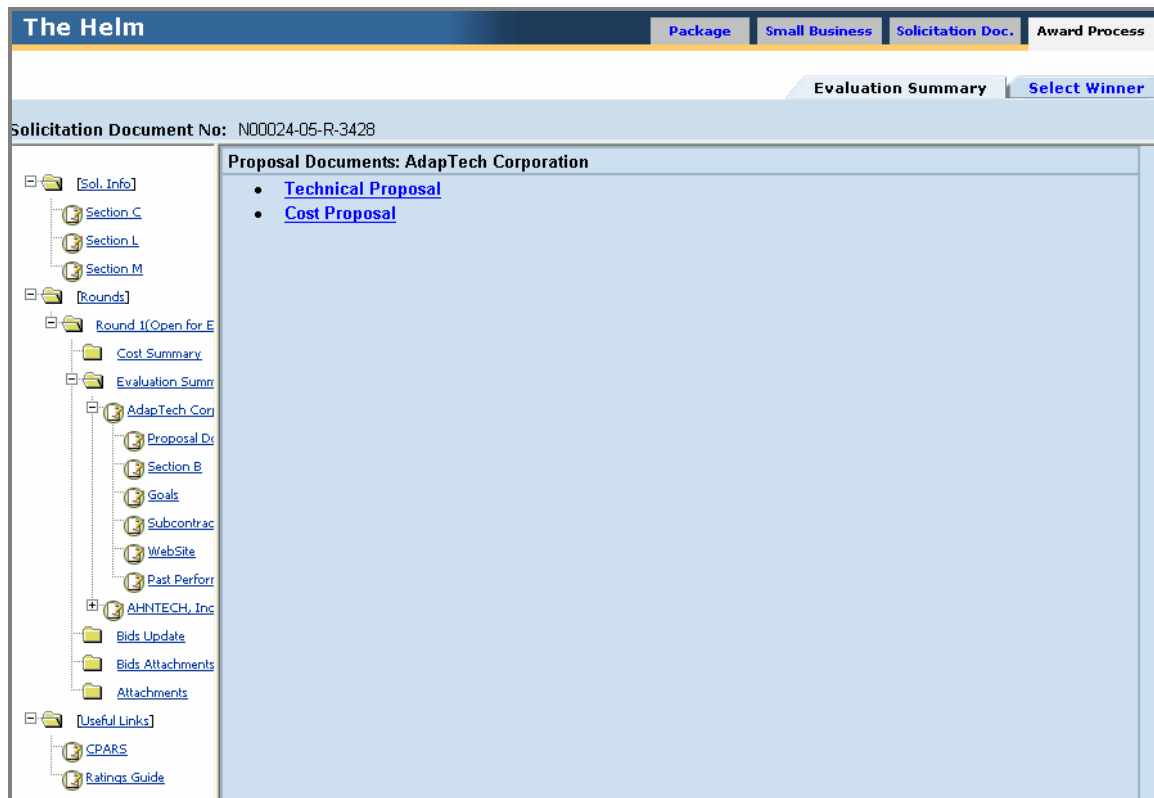
Figure 134: Award Determination – Proposal Documents

4.2.15.5.4 Section B

Click this link to display the CLIN/SLIN breakdown of the contractor's cost/price proposal. Section B information is shown in Figure 135 below.

> **NOTE:**   This link is not available to Technical or Past Performance Evaluators.

Figure 135: Award Determination – Section B – Cost Information

4.2.15.5.5 Goals

Click this link to display the contractor's subcontracting goals. Subcontracting Goals information is shown in Figure 135 below.

Figure 136: Award Determination – Goals

4.2.15.5.6 Subcontracting Plan

Click this link to display the Task Order Subcontracting Plan for each Contractor. **Note:** PCO users will be notified on this page if a vendor has submitted a bid and elected not to enter subcontracting goals.

The Task Order Subcontracting Plan information is shown in Figure 135 below.

Figure 137: Award Determination – Subcontracting Plan

4.2.15.5.7 WebSite

Click this link to launch the contractor's Web site in a new browser window.

4.2.15.5.8 Past Performance

Click this link to display the Task Order Performance Evaluations Scoring Summary for the contractor you are evaluating. To see the Performance Evaluation in detail, click the View icon for this evaluation. To see the text of each question, roll the mouse over the question mark icon next to the question number. The Past Performance page is shown in Figure 138 below.
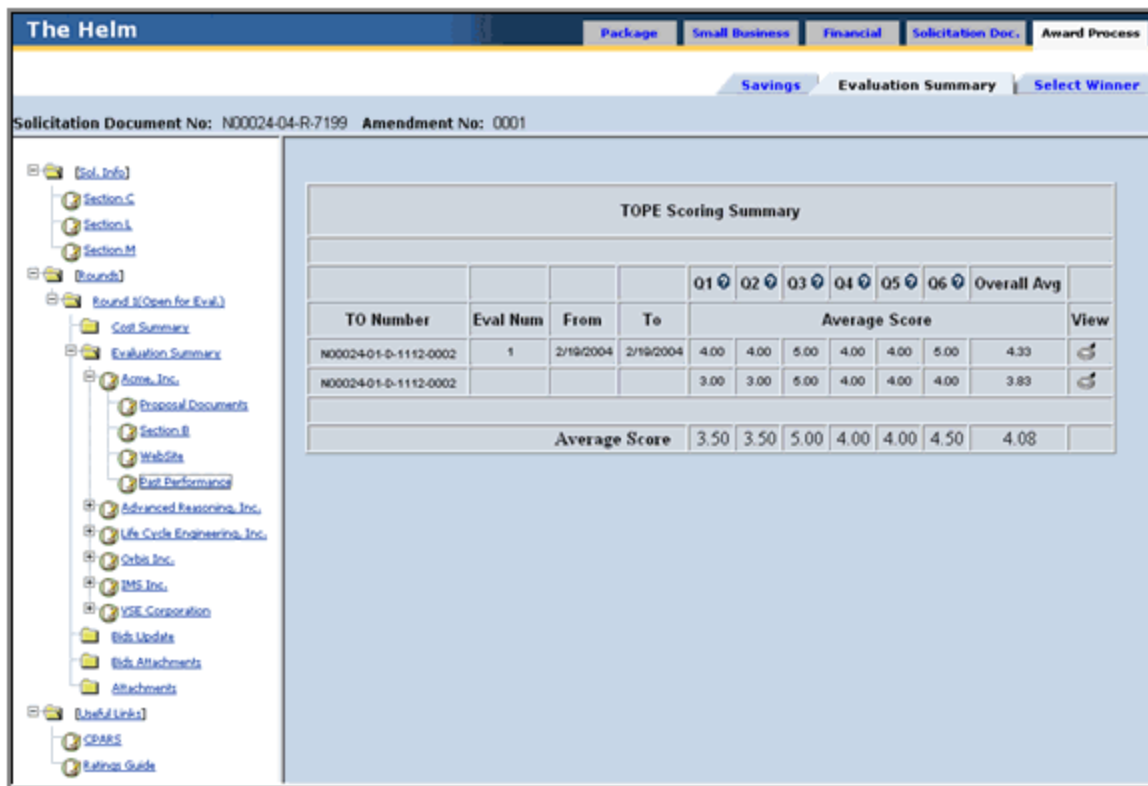
Figure 138: Award Determination – Past Performance

4.2.15.5.9 Attachments

Use this link to view a list of evaluators' attachments. Click on the attachment name to view the file.
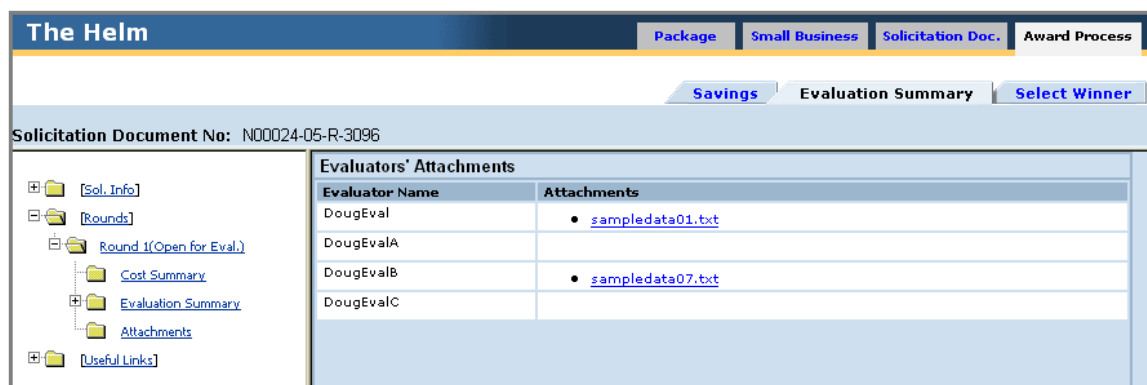
Figure 139: Award Determination – Evaluators' Attachments
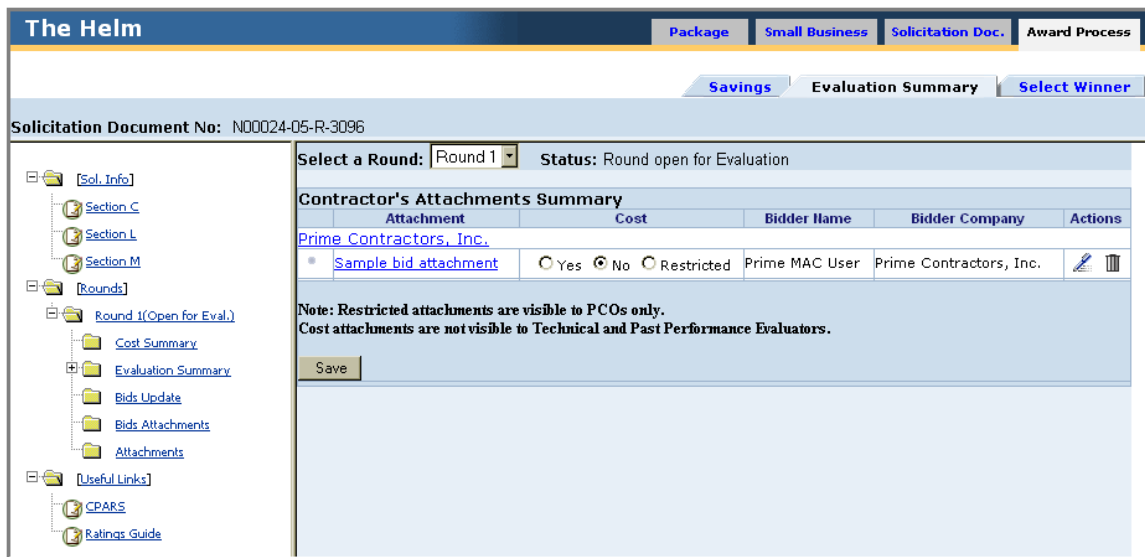
4.2.15.5.10 Bids Attachments

Use this link on the left navigation tree to view the summary of bidders' attachments. Use this screen to classify the attachments to be accessible by everybody/ by Cost evaluators only/ by

PCOs only. Press Save when done classifying the files. You can delete the attachments by clicking on the trashcan icon ⬜.

After all the necessary preparation for bid evaluation process is made (Bids Attachments classification, Bids Update), press the *Open Round for Evaluation* button to release this document to evaluators. This action will invite the evaluators to login into the system and start working on evaluations.

NOTE: This feature is only available to the PCO.

Figure 140: Award Determination – Bids Attachments

To add attachments, click on the contractor's name or on the edit icon ✎ next to the contractor's attachment. You will get a screen where you can browse for a file on your machine, indicate whether or not it's a cost or restricted attachment, and press the *Save* button to add the attachment.

Figure 141: Award Determination – Add Bid Attachments

4.2.15.5.11 Bids Update

Click on this link on the left navigation tree to change or add bids on behalf of the contractors. This may be necessary if a contractor had trouble submitting for one reason or another. You can also use this page for opening the bid evaluation process to evaluators by pressing the *Open Round for Evaluation* button.

Figure 142: Award Determination – Bids Update Screen

To access contractor's detailed cost proposal, click on the View icon ☺ next to the contractor's name. This will bring up a screen with cost data as shown in Figure 143 below.

Figure 143: Award Determination – Detailed Cost Proposal

Enter or edit SLIN data, as well as Comments, and press Save Draft to continue working on this bid, or Submit to submit a final bid on behalf of this contractor. To edit/add attachments, press *Edit Attachments* button.

4.2.15.6 Useful Links

This section contains links to related Web sites and other important information. It's available to all Award Process participants and appears at the bottom of the left navigation tree.
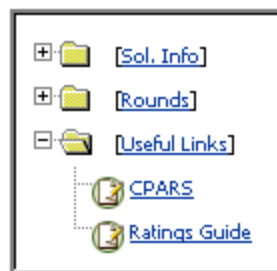
Figure 144: Award Determination – Useful Links

4.2.15.6.1 CPARS

This link will bring up a CPARS website in a separate browser window as shown in Figure 145 below.

Figure 145: Award Determination – CPARS Web Site

4.2.15.6.2 Ratings Guide

This link will bring up a document describing Evaluation Ratings procedures as shown in Figure 146 below.
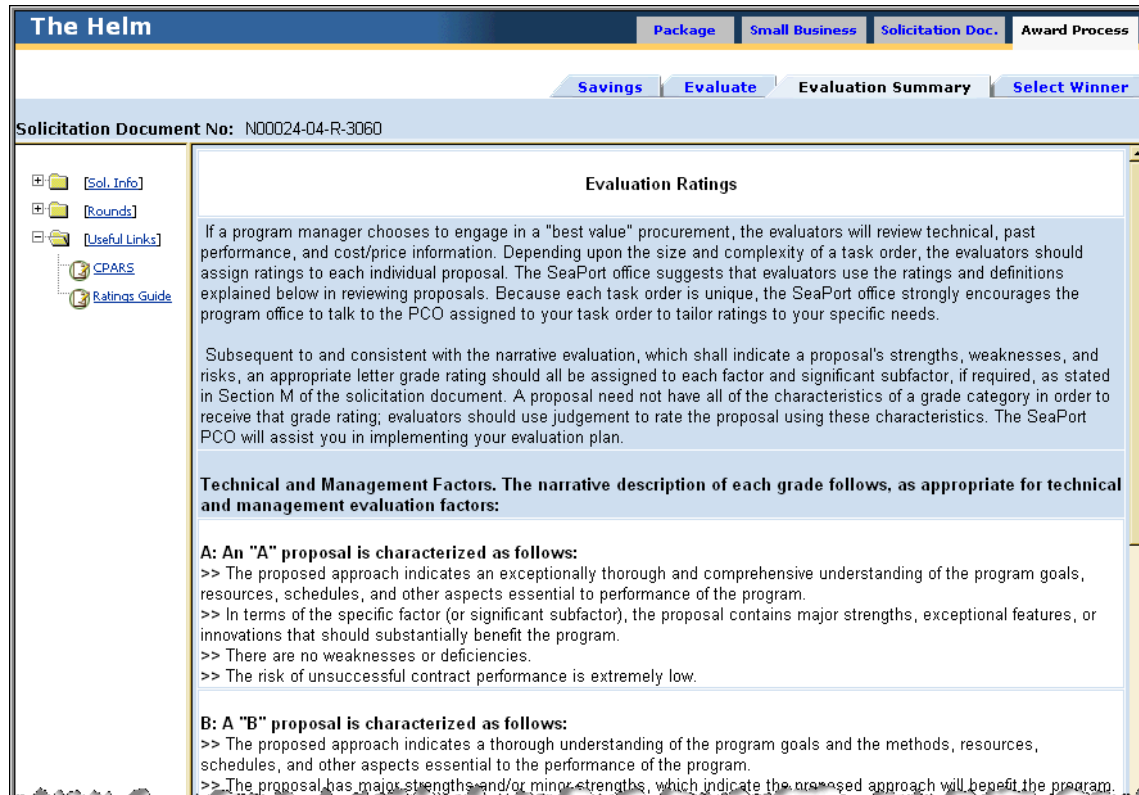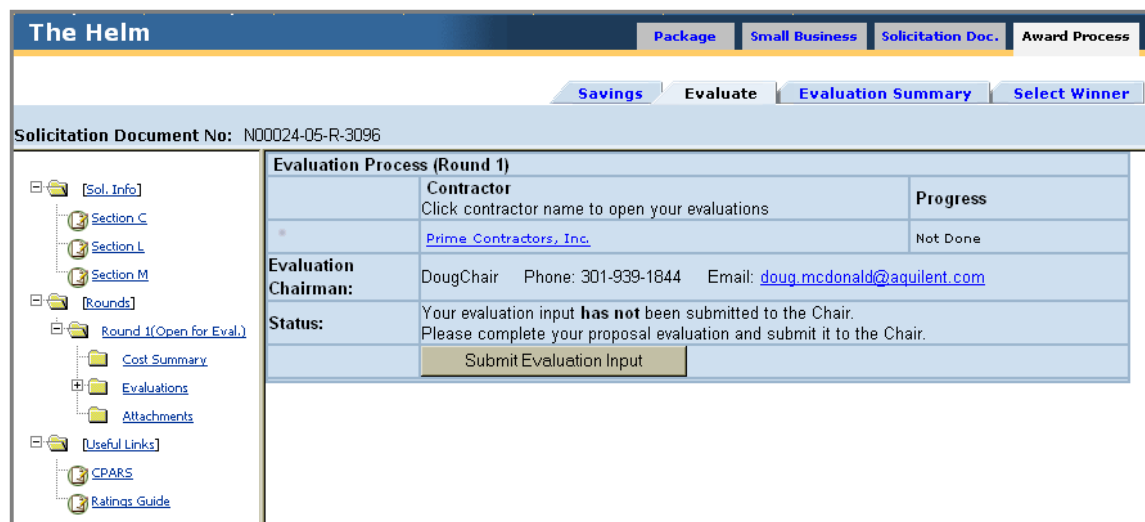
Figure 146: Award Determination – Ratings Guide

4.2.15.7   Understanding the Evaluate Tab

Beneath each round is an Evaluations folder that contains a document link for each MAC contractor that submitted a proposal for that round. Clicking the contractor's link name will display an Evaluation Process screen with the list of contractors to evaluate. The Evaluation Process screen is shown in Figure 147 below.

Figure 147: Award Determination – List of Contractors to Evaluate

Clicking on the contractor's name pops up a screen to input the rating and comment for evaluation aspects you are eligible to comment on. The example shown in FIGURE demonstrates the input screen for an evaluator who is assigned to perform Technical, Past Performance, and Cost evaluations. If an Evaluator was not assigned to perform all three of these evaluations, only the assigned evaluations would appear in the Evaluator's Input screen. The Evaluator's Input screen allows you to select a rating from a drop-down list and record an evaluation comment.

Press the *Save* button if you are planning on working on your evaluation later. When you have finished evaluating the contractor, check the *Done* checkbox and click Save.

Press the *Close* button to close the window. The Evaluation Process screen reflects your updated evaluation progress. Your progress also shows in the parenthesis next to the contractor's name in the left navigation area.

When you are ready to send all your evaluations to the chairman, press the *Submit Evaluation Input* button. You will not be able to alter your evaluations after this action.

> **NOTE:** If modifications are required, you may contact the chairman with the request to "unlock" your evaluations.

Figure 148: Award Determination – Evaluation Input

> **NOTE:** To assist you in preparing your evaluation, there are a number of additional documents and links available to you when you expand the navigation tree under each contractor.

4.2.15.8 Understanding the Select Winner Tab

Processing options accessible via this tab depend upon your role as follows:

Chairman

The chairman will use this tab to (1) recommend the winning contractor or (2) recommend two or more contractors for participation in another round of proposal submissions.

This page provides readout of contractors' cost summary and average grades summary. Click on the contractor's name to bring up a Detailed Cost Proposal for this contractor.

Click one or more checkboxes to select contractor(s). Enter Best Value Justification in the area provided. Use this section to record the best value justification for the winning contractor. This section can also be used to enter the rationale for recommending another proposal submission round. To save your work, click Save. When ready to finalize a selection and submit it to PCO, click *Recommend Winner* or *Recommend Another Round*. Once clicked, the recommendation is frozen. If needed, contact the PCO to "un-freeze" the recommendation.

Figure 149: Award Determination – Select Winner Tab – Chairman's View

The *View Summary Report* button brings up a summary of Chairman's ratings and comments for each contractor for each evaluation category, as well as Justification text. The Evaluation Summary Report is shown in Figure 150 below.

Figure 150: Award Determination – Evaluation Summary Report

The *View Summary Tech Report* button brings up a technical summary of the Solicitation. This includes General Solicitation Information, Solicitation History, a list of Evaluation Team members, a Pricing Summary, the Best Value Justification, the Chairman's ratings, and Evaluator's evaluations for each contractor. An example of a Summary Tech Report is shown in Figure 150 below.

> **NOTE:** The image in Figure 151 has been scaled down for printing. If you are viewing this document electronically (within Microsoft Word), you can increase the size of the image below by double clicking it (to open the Format Picture dialog box) and then changing the *Height* to *100%* from the Size tab. This will make it easier to read.

Figure 151: Award Determination – Summary Tech Report

4.2.15.8.1 PCO
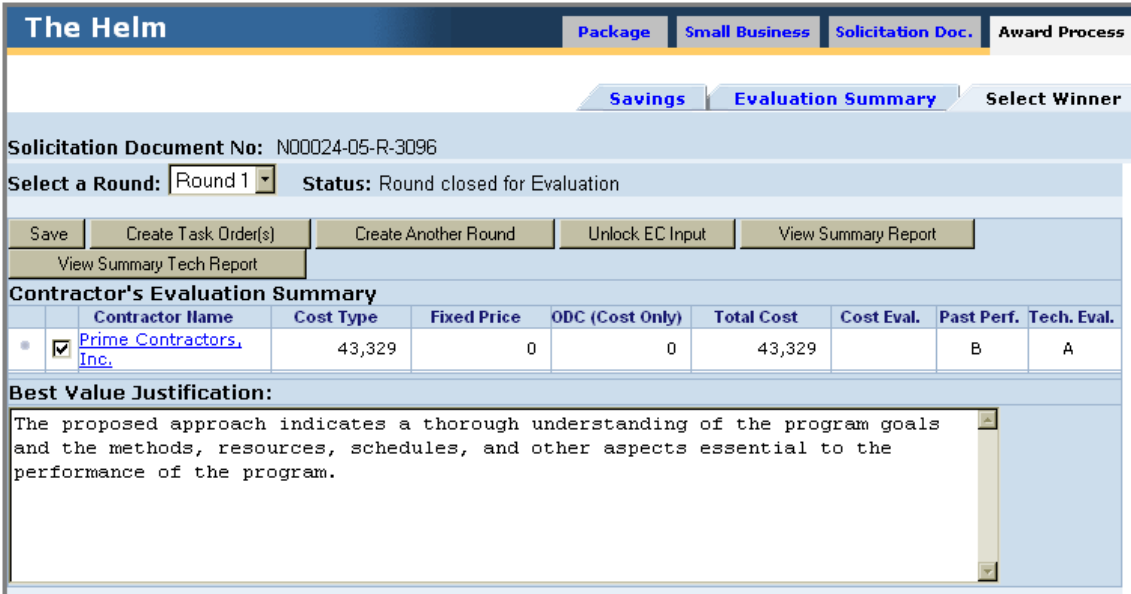
The PCO will use this tab to (1) approve the chairman's winning contractor recommendation or (2) approve and create an additional proposal submission round.

From this screen the PCO can review the Chairman's selection and justification as well as view Summary Report. If additional work by the Chairman is needed, the PCO can unlock the recommendation by clicking *Unlock EC Input* button.

The PCO can add to, or alter the Best Value Justification and press the *Save* button to record any changes.

To create another round, more than one contractor must be selected. Press the *Create Another Round* button to finalize the down-selection. You then must go to the Bid Event system to manually create another Bid Event round and invite only the selected contractors.

To create a Task Order, select a winning contractor (or contractors, if a split award is taking place), and press the *Create Task Order* button. This action creates a Task Order document and redirects you to the Administrative page. In split award situation, more than one Task Order is created.

Figure 152: Award Determination – Select Winner Tab – PCO View

5   Task Order

This section details the Task Order training session. The Task Order training session follows the structure outlined in the *SeaPort II Training Plan*, Section 3.1: Training Methodology, and contains the key concepts outlined in Section 5: Training Curriculum.

5.1   Task Order Workflow

A Task Order is an individual delivery order against a Multiple Award Contract that establishes nature of services desired and required period of performance. The diagram below illustrates the task order workflow within SeaPort.
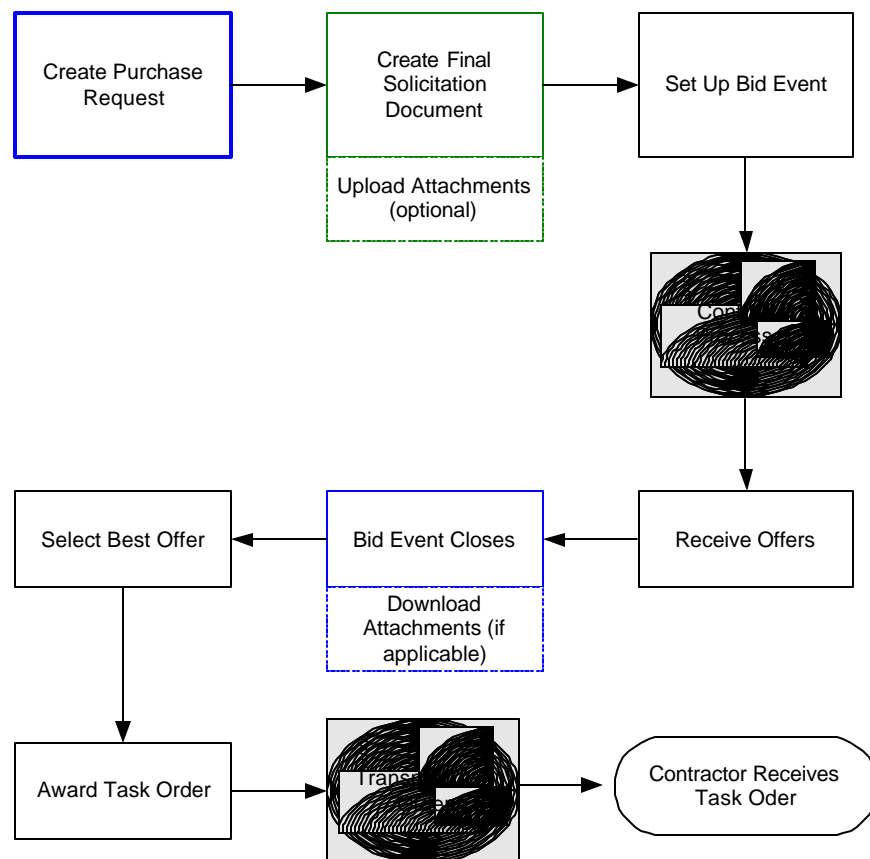
Figure 153: Task Order Workflow

5.2   Task Order Generation

After a proposal has been selected for award, the information in the Solicitation Document is transferred to the Task Order for final processing by SEA 02 and execution by the PCO. The Task Order is initially pre-populated with data from the Solicitation Document. The Originator

may review the information contained in the Task Order panels, but does not have the ability to update. Pricing information will reflect the winning proposal.

5.2.1   Create a Draft Task Order

As part of the Award Determination process a Draft Task Order is created from a Solicitation Document. This is done by the PCO from the Select Winner page by selecting a winner from the list and clicking the *Create Task Order(s)* button. The draft TO is given the next sequential number for the winning MAC contractor, and its fields are populated with information from both the purchase request and solicitation. The user is then taken to the Task Order Administrative panel.
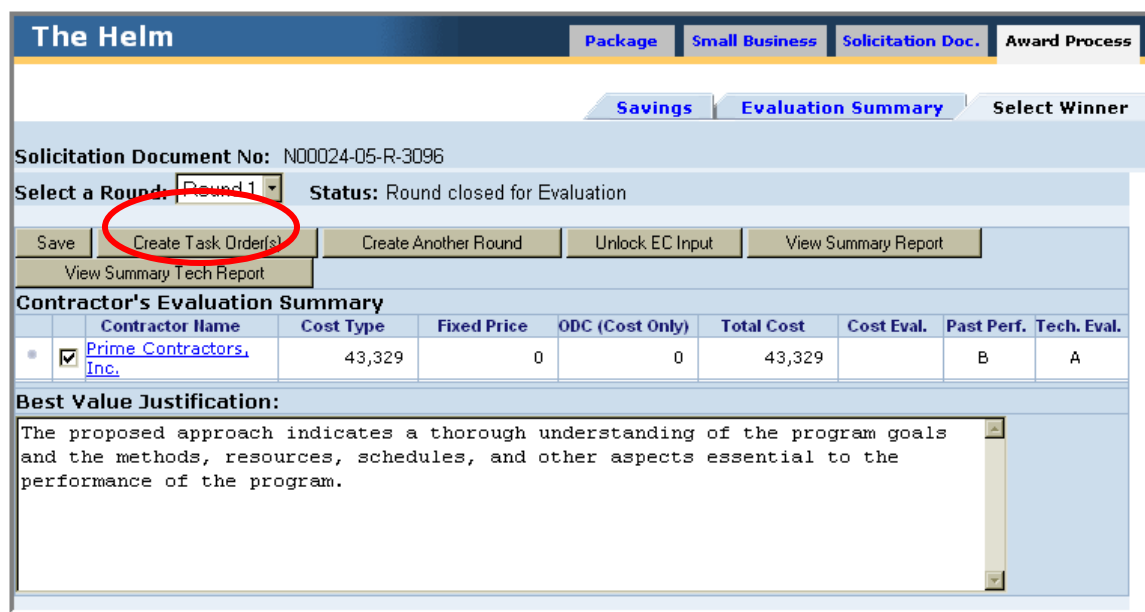
Figure 154: Create Draft Task Order

5.2.2   Add Administrative data

The Administrative panel is used to enter administrative data including award information, contracts office information, contracting officer, and task order manager. The Task Order is initially pre-populated with data from the Solicitation Document. It contains the following data fields and buttons.

Table 71: TO Administrative Panel – Fields

Field	Type	Description
Contractor's Name	Read Only	System generated.
MAC Contract No.	Read Only	System generated.
TO No.	Read Only	System generated.
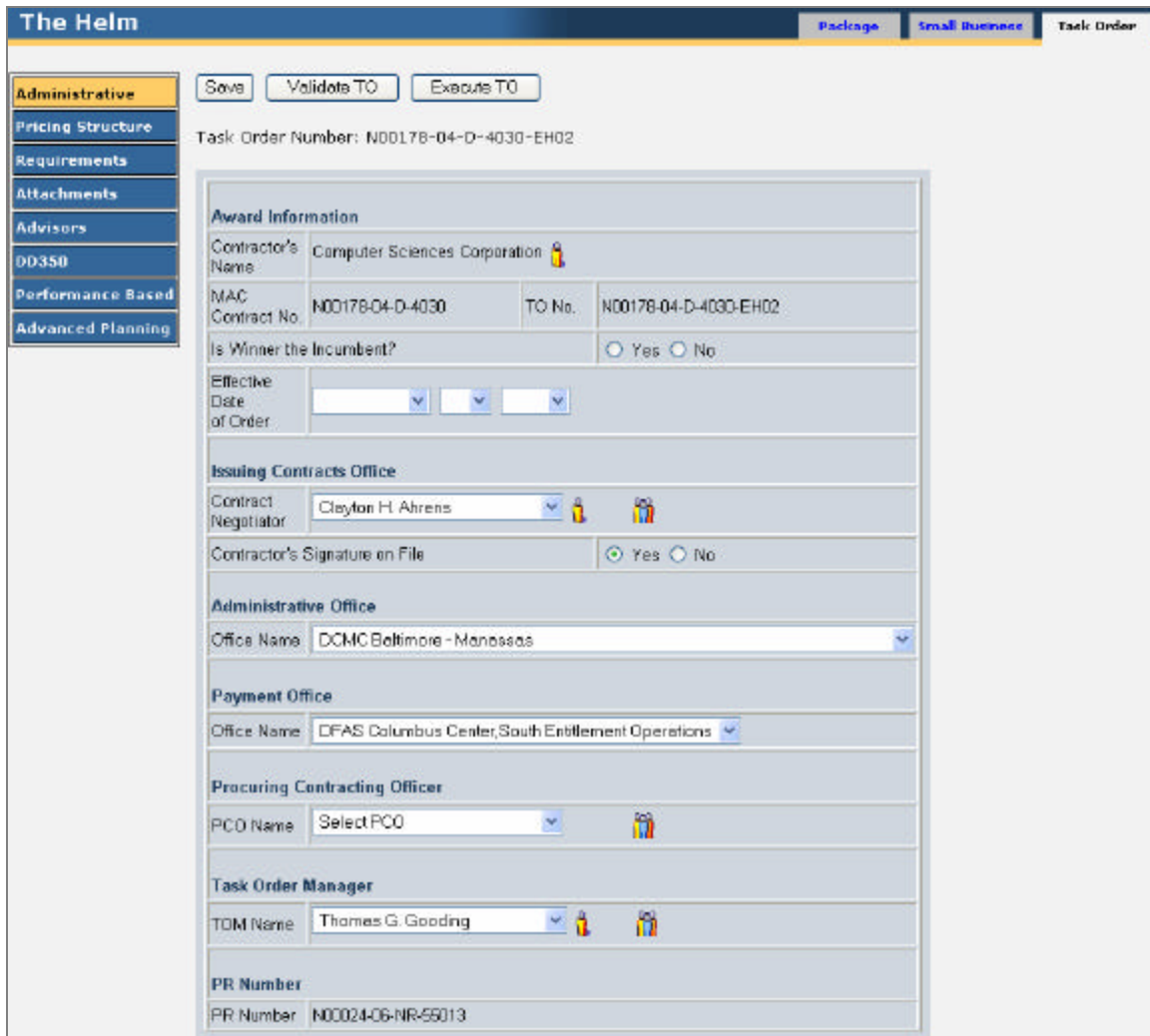
Field	Type	Description
Is Winner The Incumbent?	Radio	Choose Yes or No.
Effective Date of Order	Dropdown	Enter a date using the month, day, and year dropdown lists.
Contract Negotiator	Dropdown	Choose a Negotiator from the dropdown list. Use the 👤 icon to see the selected Negotiator's SeaPort profile. Use the 👥 icon to choose from a list of all Negotiators in the system.
Contractor's Signature on File	Radio	Choose Yes or No.
Administrative Office Name	Dropdown	Choose an Administrative Office from the dropdown list. **Note:** This field defaults to the value on the MAC Manager page for the MAC that was awarded the TO.
Payment Office Name	Dropdown	Choose a Payment Office from the dropdown list. **Note:** This field defaults to the value on the MAC Manager page for the MAC that was awarded the TO.
PCO Name	Dropdown	Choose a PCO from the dropdown list. Use the 👤 icon to see the selected PCO's SeaPort profile. Use the 👥 icon to choose from a list of all PCOs in the system.
TOM Name	Dropdown	Choose a TOM from the dropdown list. Use the 👤 icon to see the selected TOM's SeaPort profile. Use the 👥 icon to choose from a list of all TOMs in the system.
PR Number	Read Only	System generated.

Table 72: TO Administrative Panel – Buttons

Button	Description
Save	Press the *Save* button to update information in the database. If the Save button is not pressed before leaving this screen, any newly entered information will be lost.
Validate TO	Press the *Validate TO* button to ensure that all required fields have been entered. If all required fields have not been entered, the system notifies user of an error condition and this notification will be in the form of a message window indicating the missing fields.
Execute TO	Press the *Execute TO* button to create a digital signature and final version of the Task Order.

NOTE: The Save, Validate TO, and Execute TO buttons are common to several of the TO panels. They always perform the same function.

Figure 155: TO – Administrative

5.2.3 Add Pricing Structure data

The Pricing Structure panel of the Task Order is the same as in the Purchase Request and in the Solicitation Document. It is used to enter CLIN and SLIN information. Pricing information can be added, deleted, or modified from this panel. It contains the following data fields and buttons.

Table 73: TO Pricing Structure Panel – Fields
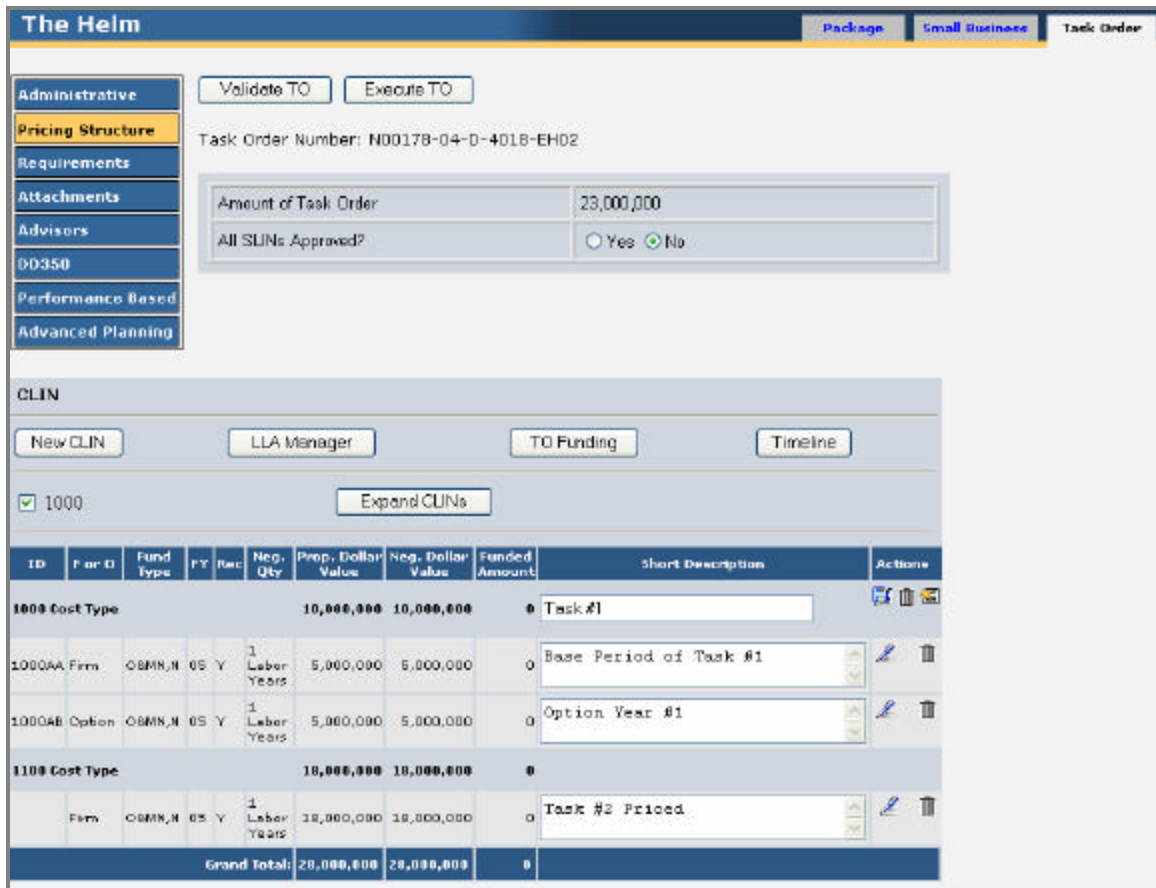
Field	Type	Description
Amount of Task Order	Read Only	System Generated.
All SLINs Approved?	Radio	Choose Yes or No.
New CLIN Window		

Field	Type	Description
CLIN ID	Dropdown	Choose from 0001 - 0009. Each CLIN ID corresponds to a specific cost type and period of performance. See table in FIGURE.
Short Description	Text Box	Enter a short description for the CLIN up to 1000 characters.
Edit SLIN Details Window		
SLIN ID #	Text Box	Enter a valid 2-letter combination. User should enter SLINs sequentially starting with AA. This field is displayed only for Informational CLINs.
CLIN #	Read Only	Displays the CLIN ID # (this field is displayed only for Priced CLINs)
Fund Type	Dropdown	Choose from the list.
FMS Case Number	Text Box	Enter the case number in the format AA-A-AAA.
Firm/Base or Option	Dropdown	Choose Firm or Option.
Fiscal Year	Dropdown	Choose the last 2 digits of the fiscal year from the dropdown list.
Fee Type	Dropdown	Choose Fixed, Award, or Incentive.
Recurring Cost	Radio	Choose Yes or No.
Performance Based	Radio	Choose Yes or No.
Service Contract Act Applicable	Radio	Choose Yes or No.
Automatically Create ODC (Cost Only) CLIN	Radio	Choose Yes or No.
Period of Performance (Select a Period)	Dropdown	Choose From and To dates using the dropdown lists.
Period of Performance (Enter Days After Award)	Text Box	Enter a number of days for this period of performance.
Short Description	Text Box	Enter a short description of the SLIN up to 1000 characters.

Table 74: TO Pricing Structure Panel – Buttons

Button	Description
New CLIN	Click the *New CLIN* button to add a contract line item number (CLIN). You must also enter a short description for the CLIN. After saving the CLIN, you can then add its associated SLINs.
	When adding the first Cost Type CLIN, the system will automatically add the first Cost Type SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.
CLIN/SLIN Wizard	Opens the Pricing Line Item Wizard described in section 3.2.4.3 above (applicable only to SeaPort-I procurement efforts).

Button	Description
LLA Manager	Opens the LLA Manager page where accounting information can be entered for multiple SLINS at once. This is described in Section 5.2.3.3 below.
TO Funding	Opens the TO Funding page where funding information can be entered for multiple SLINS at once. This is described in Section 5.2.3.4 below.
Timeline...	Opens the Timeline window described in section 4.2.2.3 above.
Expand CLINs	Allows the user to see all SLINS associated with a CLIN. CLINS are presented with the details collapsed when the page length exceeds the system-defined limit (this is rare).

Figure 156: TO – Pricing Structure

5.2.3.1   New CLIN

Selecting the *New CLIN* button will open the following window as a pop up.

Create New CLIN

Please enter a CLIN ID:
Note: *New CLIN ID scheme (1000 - 9999) pertains to SeaPort-e efforts only. SeaPort-I efforts will use the CLIN IDs ranged from 0001 - 0009.*

[Cancel] [Next]

Valid CLINS are:

Cost Type:	0001, 0004, 0007, 1000's, 4000's, and 7000's
Firm Fixed Price:	0002, 0005, 0008, 2000's, 5000's, and 8000's
ODC (Cost Only):	0003, 0006, 0009, 3000's, 6000's, and 9000's

Period of Performance for each CLIN is as follows:

CLINS	Period of Performance
0001 or 1000's	05-APR-04 TO 04-APR-09
0002 or 2000's	05-APR-04 TO 04-APR-09
0003 or 3000's	05-APR-04 TO 04-APR-09
0004 or 4000's	05-APR-09 TO 04-APR-14
0005 or 5000's	05-APR-09 TO 04-APR-14
0006 or 6000's	05-APR-09 TO 04-APR-14
0007 or 7000's	05-APR-14 TO 04-APR-19
0008 or 8000's	05-APR-14 TO 04-APR-19
0009 or 9000's	05-APR-14 TO 04-APR-19

Figure 157: TO – New CLIN

Next, the user will be prompted to categorize the new CLIN as either an Informational CLIN (with funding at the SLIN level) or Priced CLIN (funding at CLIN level). **Note:** Should a user select Priced CLIN, they will have the option of adding Informational SLINs in order to break out Fund Types and Lines of Accounting. For more information on Informational SLINs to a Priced CLIN, refer to Section 5.2.3.2.3. 1.

Create New CLIN

Please choose a CLIN category below:

○   Informational

○   Priced

[Previous]   [Next]

Figure 158: PR – New CLIN – CLIN Categorization

For Informational CLINs, SeaPort will then prompt the user for a Short Description.

Create New CLIN

CLIN ID: 1001

Short Description

☑ **Automatically create ODC (Cost Only) CLIN.**

[Save]   [Cancel]

Figure 159: PR – New CLIN – Short Description

Priced CLINs will instead be routed directly to the edit details screen.

5.2.3.2   Edit SLIN Details
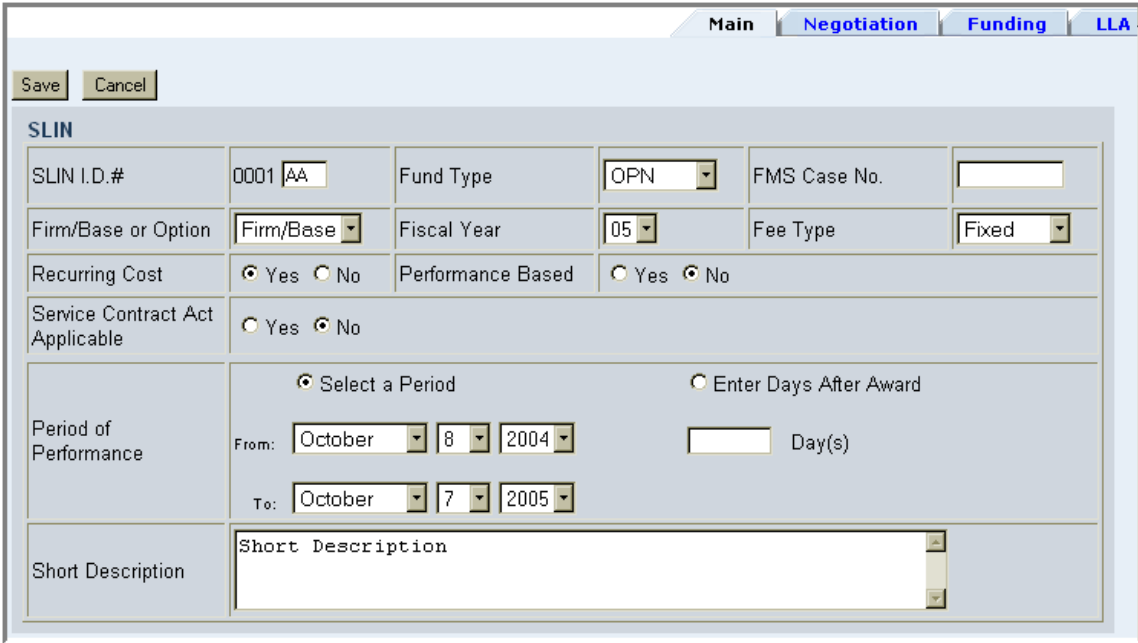
A SLIN is a sub line item number. Informational CLINs are comprised of SLINs. In SeaPort-e, SLINs are added either by creating an Informational CLIN, or by clicking on the *Add SLIN* button within an existing CLIN.

The image below shows the SLIN Details page. A separate SLIN is required for each appropriation type of fund, each fiscal year, and each option.

NOTE: When adding the first Cost Type CLIN, the system will automatically add the first Cost Type SLIN and, if the user selects this option, the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.

5.2.3.2.1 Main

The Main tab allows the user to edit information that was entered when the SLIN was created.

Figure 160: TO – Edit SLIN Details (Cost Type) – Main

5.2.3.2.2 Negotiation

The Negotiation tab contains Target and Negotiated pricing information. The Target pricing information is an internal number based on the proposal. The Negotiated pricing information is the final price that is negotiated with the contractor.
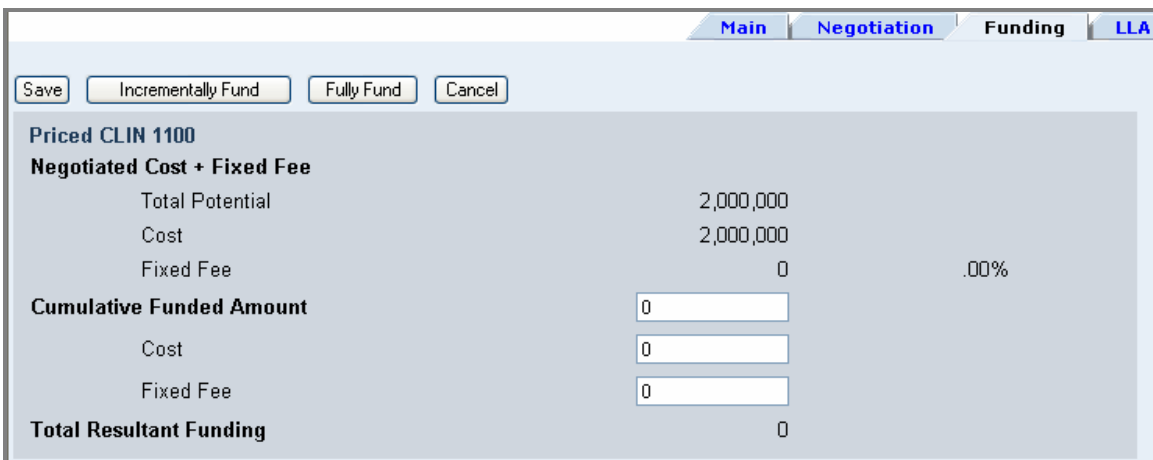
Figure 161: TO – Edit SLIN Details – Negotiation

5.2.3.2.3   Funding

The Funding tab pulls the negotiated amounts. The funding amount fields are cumulative amounts. The *Fully Fund* button will fully fund the SLIN, and will automatically allocate the funding between cost and fee.

The *Incrementally Fund* button will be displayed only for Priced CLINs. For more information on funding Priced CLINs, see Figure 5.2.3.2.3.1 below.

Correct incremental funding will be reflected on the resulting DD350. Type into the text fields to enter funding information manually.

Figure 162: TO – Edit SLIN – Funding

5.2.3.2.3.1   Funding For Priced CLINs

The *Incrementally Fund* button will be displayed only for Priced CLINs. Choosing this button will enable the user to supply Informational SLINs below their Priced CLIN (and, by extension, break out separate Fund Types and Lines of Accounting). Once selected, the user can enter

the Cumulative Funded Amount broken out by Cost & Fixed Fee, and can also enter a Description and Funding Amount for each Informational SLIN added. Choosing the Create New Informational SLIN button will add additional Informational SLINs for the user to enter Descriptions and Funding Amounts to. The SLIN Number will be sequenced automatically. Clicking the edit icon ✎ next to the Informational SLIN data found on the Funding tab will direct the user to the LLA page. For more information on entering LLAs, refer to Section 5.2.3.2.4 below.
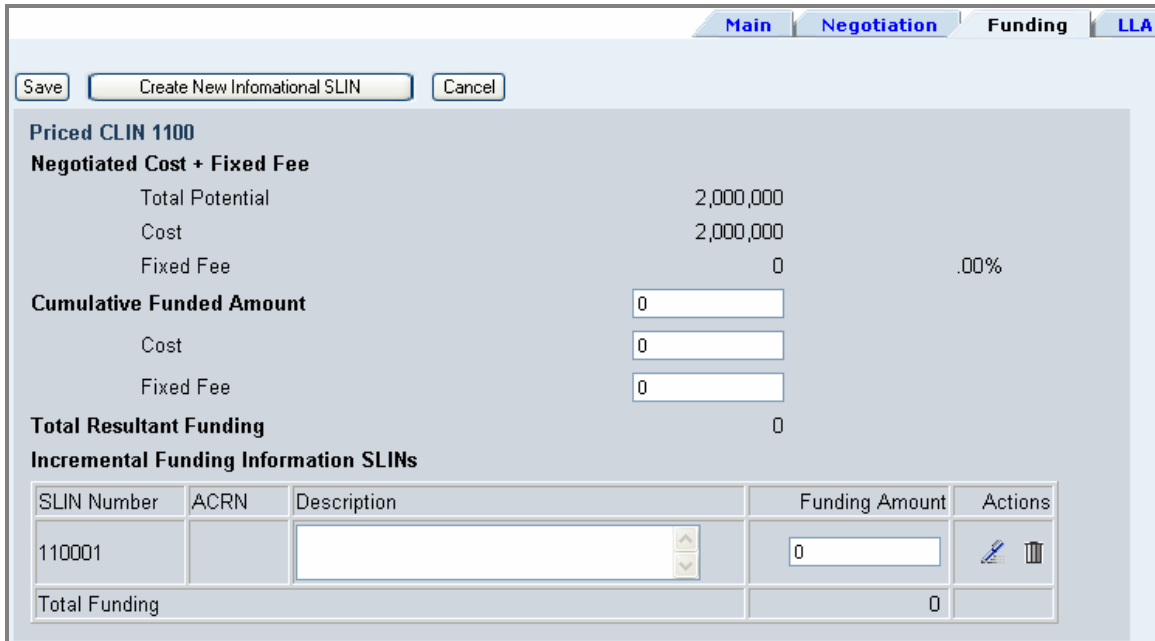
Figure 163: TO – Edit SLIN – Priced CLIN Funding
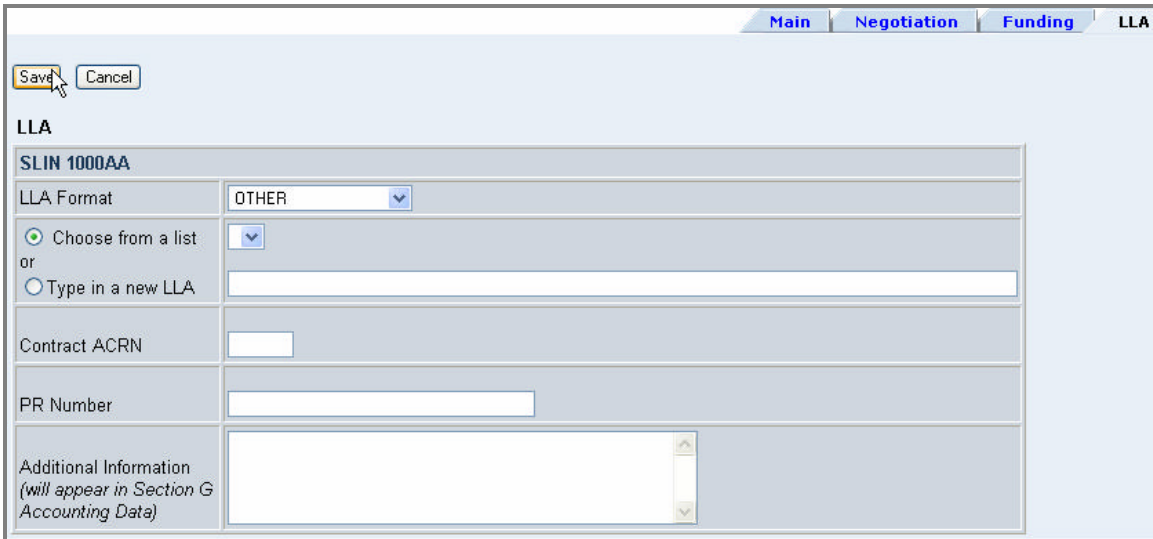
Figure 164: TO – Pricing Structure (Priced CLIN w/Informational SLINs)

5.2.3.2.4   LLA (Long Line of Accounting)

The LLA information needs to be entered for the Task Order to be executed. Either type in the LLA information or choose it from the dropdown list. If a PR number was generated outside the system, it should be entered here.

Note: The ACRN entered will not appear in Section G of the result order document. One option for having this appear in Section G is to prepend the LLA field with the ACRN value.

Figure 165: TO – Edit SLIN – LLA

5.2.3.3 LLA Manager

Entering accounting information for multiple SLINS may be done from the LLA Manager page. Here you can enter the ACRN, PR Number, Standard Doc Number, Accounting Info, and LLA for each individual SLIN. LLA data entered on this page must be use the 'Other' format. If another format is needed, the user may click the edit icon ✎ to enter LLA data in another format. The LLA Manager page is shown in Figure 166 below.

Figure 166: TO – LLA Manager

5.2.3.4 TO Funding

Entering funding information for multiple SLINS may be done from the TO Funding page. SLINS may be fully funded by selecting the *Fully Fund* button or they may be funded by

entering funding information directly into the Funding text boxes. The TO Funding page is shown in Figure 167 below.

Figure 167: TO – TO Funding

5.2.4 Add Requirements data

The Task Order Requirements Panel is the same as the Solicitation Document Requirements panel. It consists of a list of links (noted in blue text). Blank icons ⬜ reveal text Sections with no data entered. Filled icons 📄 reveal Sections with existing data. Some of the sections are pre-populated. The following sections are available from the Requirements page.

- ✎ Comments
- ✎ General Information
- ✎ Supply and Services
- ✎ Section B Text
- ✎ Section C Statement of Work
- ✎ Section D Packaging and Marking
- ✎ Section E Inspection and Acceptance
- ✎ Section F Deliveries or Performance
- ✎ Section G Accounting Data
- ✎ Section G Contract Administration Data (applicable to Seaport-e efforts)

- ? Section H Special Contract Requirements
- ? Section I Contract Clauses
- ? Section J List of Attachments

Figure 168: TO – Requirements

5.2.4.1 Requirements Detail

Each requirement in the list is represented by a link. Selecting any of these links will bring up a Requirements Details window in which to enter text. An example of such a window is found in Figure 169. Table 75 and Table 76 below detail the fields and buttons contained on the entry forms.

> **NOTE:** Typing into an area that is auto filled can result in your typed text being overwritten by the template text.

> **NOTE:** Standard I Clauses are already contained in the MAC Contract. Only include any additional or special I Clauses.
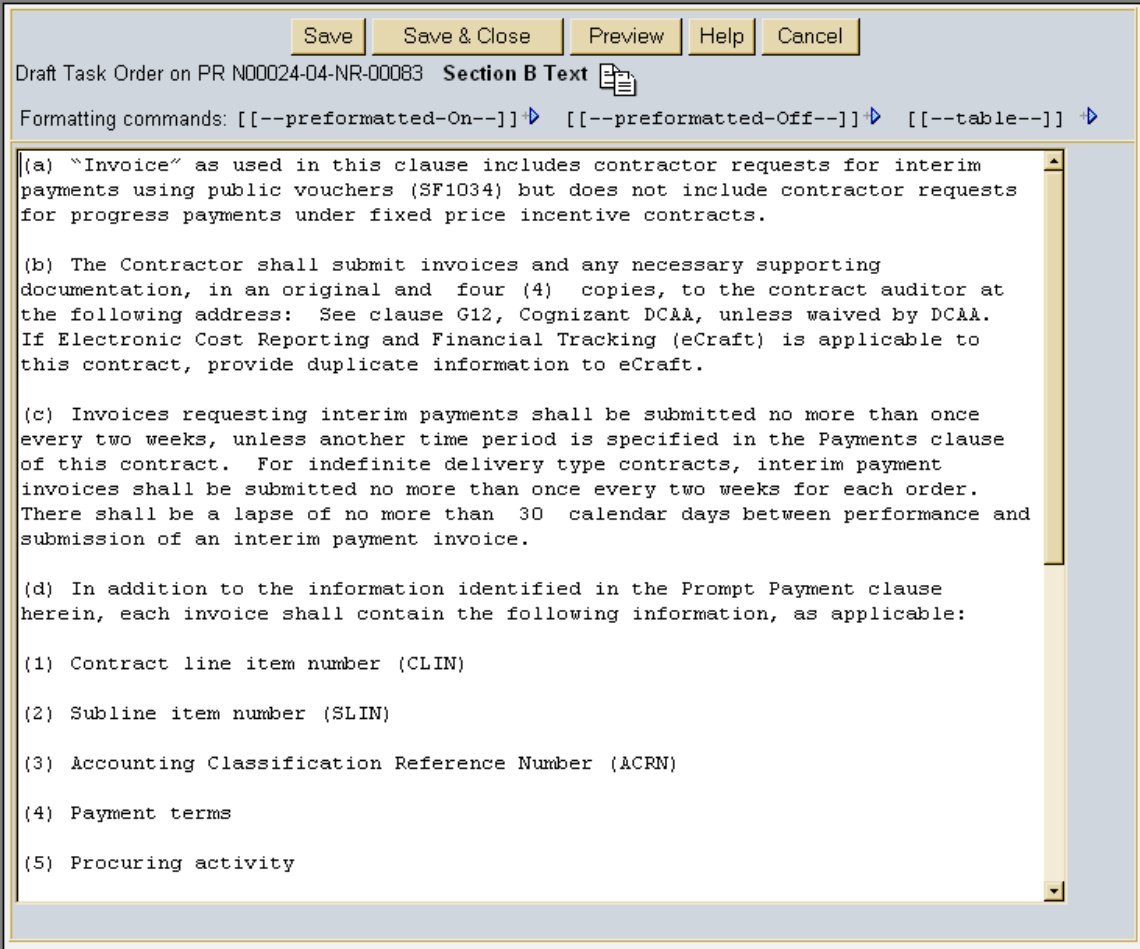
Table 75: TO Requirements Panel – Fields

Field	Type	Description
Text Entry	Text Box	Enter the text of the Requirement.

Field	Type	Description
[[--preformatted-On--]]	Command	"Typewriter" mode. Each space and carriage return in the textbox appears verbatim in the PDF. Lines do not wrap. This is how to preserve your line-breaks and alignment onscreen and in the PDF. Use this technique for addresses, poetry, tabular text, etc.
[[--preformatted-Off--]]	Command	Resume "wrapping" long lines to form paragraphs. Normal text. Press Enter at the end of each paragraph.
[[--table--]]	Command	The following lines constitute a table, with a Tab between cells. To add a column insert a Tab into each row. **Note:** In the PDF, every table occupies the full width of the page.
Commercial/Special	Radio	Choose Commercial or Special. **Note:** Only available in Section D Packaging and Marking.

Table 76: TO Requirements Panel – Buttons

Button	Description
Save	Saves the text in the text area.
Save & Close	Saves the text in the text area and closes the window.
Preview	Brings up another window that displays the text as it will appear in the PDF document. (This is especially useful when using the formatting commands)
Pin...	Brings up a window where the system's automatic fill-ins (e.g., number of hours, SLINs are fully-funded, etc., etc.) are marked with a checkbox. If you need to "freeze" any of those substitutions so it becomes plain text and ceases to automatically update, checkmark it and press Save. Fill-ins that you leave unchecked will continue to update automatically.
Help	Brings up the Help system in a separate window.
Cancel	Closes the window without saving changes.
View Templates	Represented by the icon . Opens a pop up window that contains all templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them.

Figure 169: TO – Requirements Detail

5.2.4.2   Requirements Templates

Selecting the templates icon opens a pop up window that contains all of the SeaPort templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them. After selecting the templates icon from the Requirements Details page, a window will appear where the user can choose a template. An example of this window is represented in Figure 170 below. Different Requirements will have different templates available (or no templates at all), but the procedure for choosing a template is the same.

Table 77 and Table 78 below detail the fields and buttons contained on template page.

Table 77: TO Template Page – Fields

Field	Type	Description

Field	Type	Description
Enter a Keyword	Text Box	A keyword can be any search term that is contained in the text of the template. Entering a keyword and selecting *Go* will list only those templates that contain that keyword.
Choose an Activity	Dropdown	Choose an Activity from the dropdown list. Choosing an Activity and selecting *Go* will list only those templates that are part of that Activity.
Choose a Template	Dropdown	Choose a template from the dropdown list. Choosing a template and selecting *Go* will display the template text in the textbox below.
Template Name	Read Only	System-generated based on the selected template.
Activity	Read Only	System-generated based on the selected template.
Template Text	Text Box	This is the actual text of the selected template. You can read the text of any template here before you choose to include it in your requirement. **Note:** You will have the opportunity to edit the template text after it is copied into the requirement.

Table 78: TO Template Page – Buttons

Button	Description
Close	Closes the Templates window.
Go	Searches the SeaPort templates repository for a template that matches the selected criteria.
Copy to Requirements Page	Copies the text displayed in the Template Text Box to the Requirement.
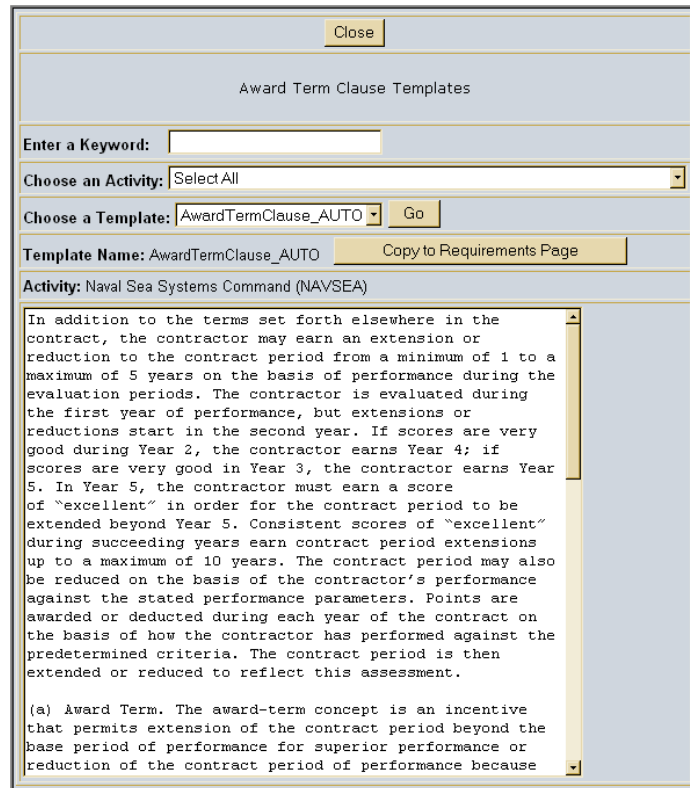
Figure 170: TO – Requirements Template

5.2.4.3   Importing text from Microsoft Word

Requirements text may be imported from Microsoft Word or any other word processing program. Below are some hints for successfully importing text from Microsoft Word. These hints may or may not apply to other word processing software.

Follow these steps:

Step 1.   Locate each table in the Word document. Right above the table, put the following command: [[--table--]]

Step 2.   Locate each place where Seaport must refrain from forming paragraphs.

Before each such place, put the command [[--preformatted-On--]]

After each such place, put the command [[--preformatted-Off--]]

Step 3.   For each bullet list, choose whether it should come into Seaport as (a) paragraphs or (b) a preformatted section.

If you take no special action, each bullet point will be a paragraph on its own.

You can achieve a more compact result (if the bullet points are short) by using Preformatted mode for the bullet list.

Step 4.   Select the text in the Word document.

Step 5.   Paste it into Seaport.

NOTE: You may paste into Seaport first, and then put in the command lines. But you may feel you get a better view of what's going on, using Word for those steps.

5.2.5   Add Attachments

The Attachments panel is the same in PR, SD, and TO. Users are able to attach any electronic files to the Task Order that may apply. For example, drawings, specifications, organizational structures, or background information may all be attached at the Attachments Panel.

To add a new attachment, the user should select the *New* button. By selecting *Browse* on the following screen, the user is able to browse through their files, either locally, a network, or on desk, using a browser. Upon finding the file you wish to attach, double click on the file or select the file and click *Open*. Enter a description, e.g, "Milestone Timeline" in the text box. Clicking the *Save* button returns the user to the main Attachments screen. Under the Actions column, the user can click the edit icon ✎ to edit the Purpose text or the trashcan icon 🗑 to delete an attachment.

> **NOTE:**   If you want to update an attachment that has already been added, you will need to delete the original and then upload the newer version of the file.
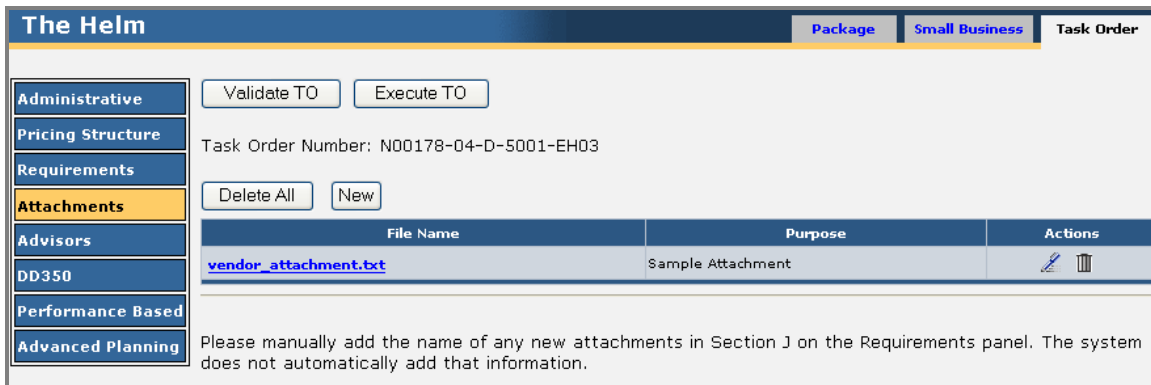
The Attachments panel is used to add attachments to the Task Order. It contains the following data fields and buttons.

Table 79: TO Attachments Panel – Fields

Field	Type	Description
Filename	Link	The attachment's filename. Selecting this link will download the attachment. You will be prompted to either save or open the attachment depending on the attachment type.
Purpose	Read Only	The Purpose text that was entered when the attachment was saved.

Table 80: TO Attachments Panel – Buttons

Button	Description
Delete All	Delete All attachments in the list.
New	Add a new attachment.
Edit	Represented by the icon ✎, the attachment's Purpose text can be edited.
Delete	Represented by the icon 🗑, the attachment can be deleted.
Save	Save the attachment and return to the Attachments panel.
Cancel	Return to the Attachments panel without saving the attachment.
Browse	Browse your computer for a file.
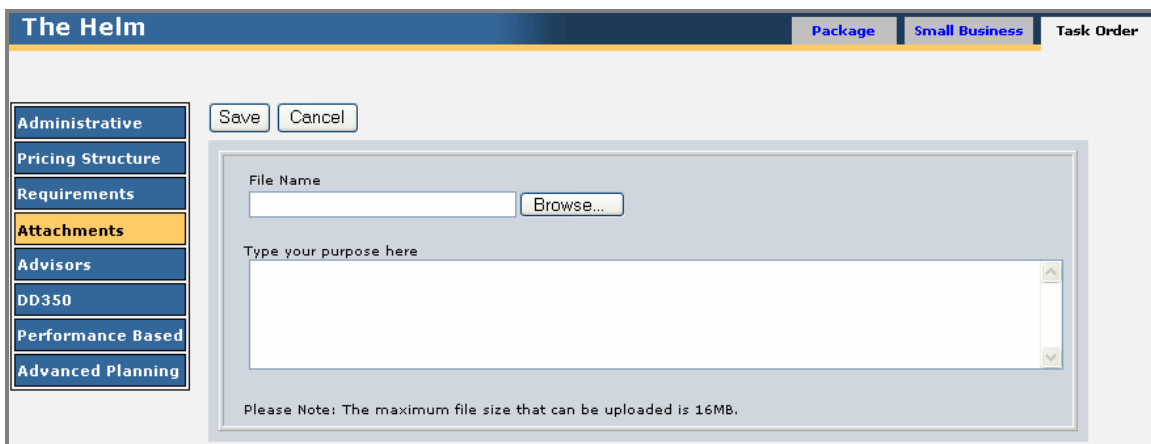
Figure 171: TO – Attachments

Figure 172: TO – Attachments – Add Attachment

5.2.6 Add Advisors data

The Advisors panel is the same as in the Solicitation Document. It lists all users that have been added to the Task Order. Advisors can be added to or removed from this list. The controls featured on this page are described in Table 81 below.

Table 81: TO Advisors Panel – Buttons

Button	Description
Add To The List	Clicking this button will add the selected Advisor's name to the list above.
View All Activities	Selecting this icon. opens a pop-up window where the user can select users from Activities other than their own.
Remove	Selecting this icon will remove the Advisor's name from the list.

Figure 173: TO – Advisors
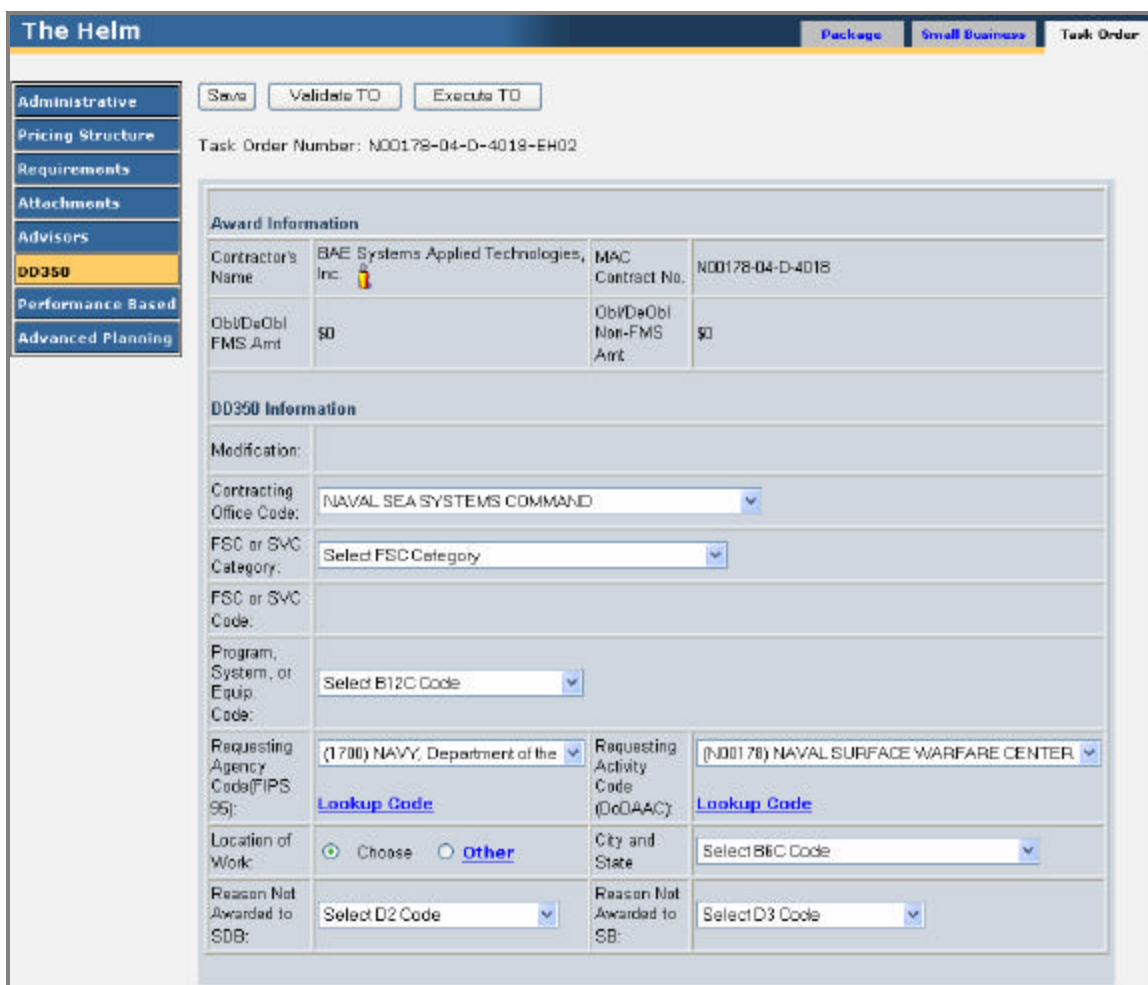
5.2.7   Add DD350 data

The DD350 panel is used to enter DD350 information. DD350s are required fill-ins for all new awards and funding actions within SeaPort. The DD350 panel contains the following data fields and buttons.

Table 82: TO DD350 Panel – Fields

Field	Type	Description
Contractor's Name	Read Only	System Generated based on the contractor selected during the Award Determination process.

Field	Type	Description
MAC Contract No.	Read Only	System generated.

Obl/DeObl FMS Amt	Read Only	System generated. This information is driven from the pricing and funding information. The abbreviations used are:
		   ↰ Obl – obligate
		   ↰ Deobl – deobligate
		   ↰ FMS – foreign military sales
		 This information gets reported in the DD350

Obl/DeObl Non-FMS Amt	Read Only	System generated. This information is driven from the pricing and funding information.
Modification	Dropdown	Choose a modification explanation from the list.
Contracting Office Code	Dropdown	Choose a code from the dropdown list.
FSC or SVC Category	Dropdown	Choose a category from the dropdown list.
FSC or SVC Code	Dropdown	Choose a code from the dropdown list.
Program, System, or Equip. Code	Dropdown	Choose a code from the dropdown list.
Requesting Agency Code(FIPS 95)	Dropdown	Choose a code from the dropdown list. Selecting the *Lookup Code* link opens a list of all codes in a new browser window.
Requesting Activity Code(DoDAAC)	Dropdown	Choose a code from the dropdown list. Selecting the *Lookup Code* link opens a list of all codes in a new browser window.
Location of Work	Radio	Select *Choose* or *Other*. Selecting the *Other* link opens the FIPS 55-DC3 Index in a separate browser window.
City and State	Dropdown	Select the city and state where the work will be performed from the dropdown list.
Reason Not Awarded to SDB	Dropdown	Choose a reason from the dropdown list.
Reason Not Awarded to SB	Dropdown	Choose a reason from the dropdown list.

Figure 174: TO – DD350

NOTE: The PCO should carefully check the Obl/DeObl FMS Amt and the Obl/DeObl Non-FMS Amt before a TO is executed.

5.2.8 Add Performance Based data

The Performance Based panel is used to enter performance data. It contains the following data fields and buttons.

NOTE: The information entered here is what will be reflected in the DD350. Make sure to classify the TO as Performance-Based or Non Performance-Based so that the DD350 will be correct.

Table 83: TO Performance Based Panel – Fields

Field	Type	Description
Performance Based	Radio	Choose Yes or No.

Field	Type	Description
Justification	Text Box	Enter the Justification for not structuring your Task Order to be performance-based.
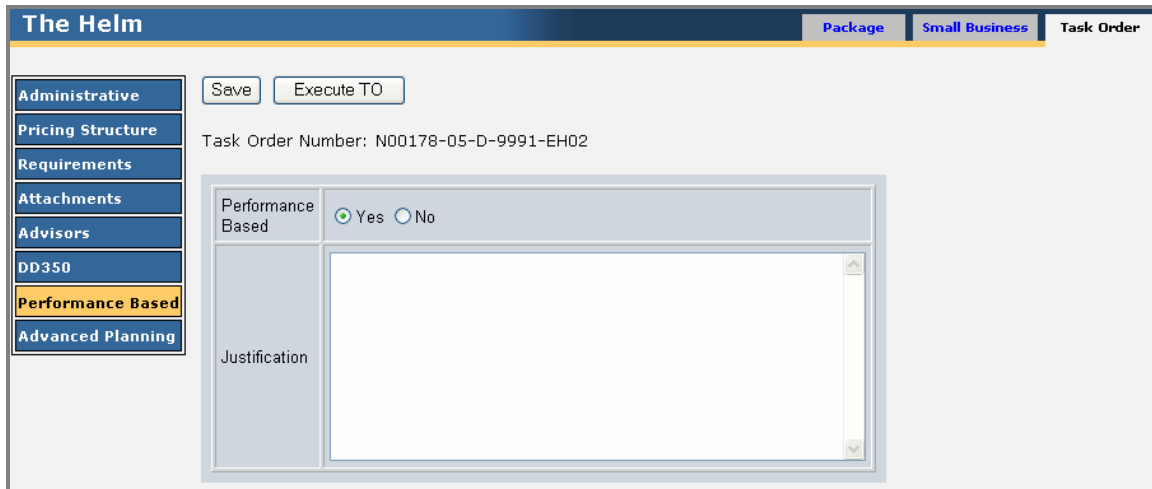
Figure 175: TO – Performance Based

5.2.9   Release Advanced Planning Data

The solicitation Advanced Planning panel is identical to the Advanced Planning panel from the PR & Solicitation. The Advanced Planning panel is accessible prior to the Task Order being executed.

5.2.10   Execute Task Order

Selecting the *Execute TO* button from any Task Order panel will validate and execute the Task Order. The system will present a notification screen as shown in Figure 176 below. Upon execution, the Task Order will automatically be posted to NAFI. In addition, attached files will be sent to NAFI as well. The notification screen enables the PCO user to categorize each attachment as it pertains to NAFI.
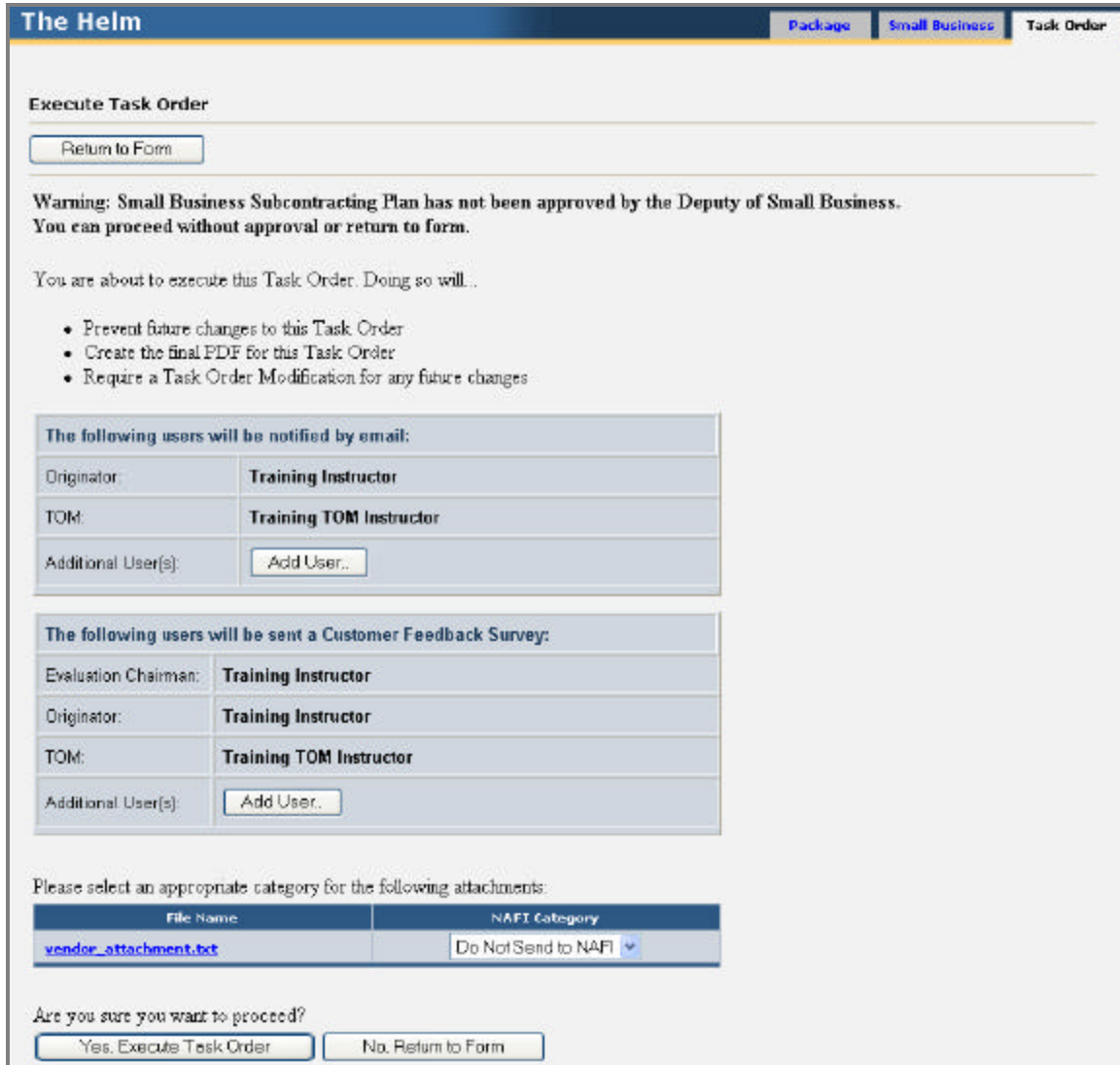
Table 84: Execute TO – Fields

Button	Description
NAFI Category	Allows the PCO to select a NAFI category for each attachment included in the procurement package.

Table 85: Execute TO – Buttons

Button	Description
Return to Form	Returns the user to the Task Order Form (Administrative Panel)

Button	Description
Add User	Opens the User Search feature. Additional users can be selected to be notified via e-mail or to receive a Customer Satisfaction Survey.
Yes, Execute Task Order	Executes the Task Order.
No, Return to Form	Returns the user to the Task Order Form (Administrative Panel)

Figure 176: TO – Execute Task Order

5.2.11   Small Business

Both the Set Aside and Subcontracting Data are available form the Small Business tab.

5.2.12   Set Aside

The Set Aside panel is no longer editable at this stage of the procurement process.   It is available for reference.

Figure 177: TO – Small Business – Set Aside

5.2.13   Subcontracting Data

Once the Task Order has been executed, the Subcontracting Data form is available to the PCO. It is shown in Figure 178 below. Goals are entered from the subcontracting plan. Actuals are entered every six months - as they become available. The form will generate the current average. Comments are entered by the PCO.

Figure 178: TO – Small Business – Subcontracting Goals and Actuals

5.2.14 Task Order Modification Process

If a Task Order modification needs to be created, the PCO chooses the specific package from the Document Library and presses the *Create TO Modification* button from the Package Home Page as shown below.

Figure 179: TO Modification – Create TO Modification Button

Upon pressing the *Create TO Modification* button the user is presented with the verification dialog box shown in Figure 180 below.
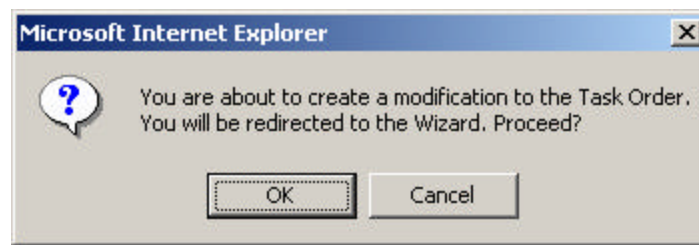
Figure 180: TO Modification – Verification Dialog

If the user chooses to continue and create the modification, the system first prompts the user to classify the modification as unilateral or bilateral. Unilateral modifications may be executed without the approval or consent of the awarded vendor. Bilateral modifications may not be executed until the awarded vendor has approved of the change.

Figure 181: TO Modification – TO Modification Wizard Screen – Bilateral/Unilateral

Next, the TO Modification Wizard prompts the user to describe the type of modification.
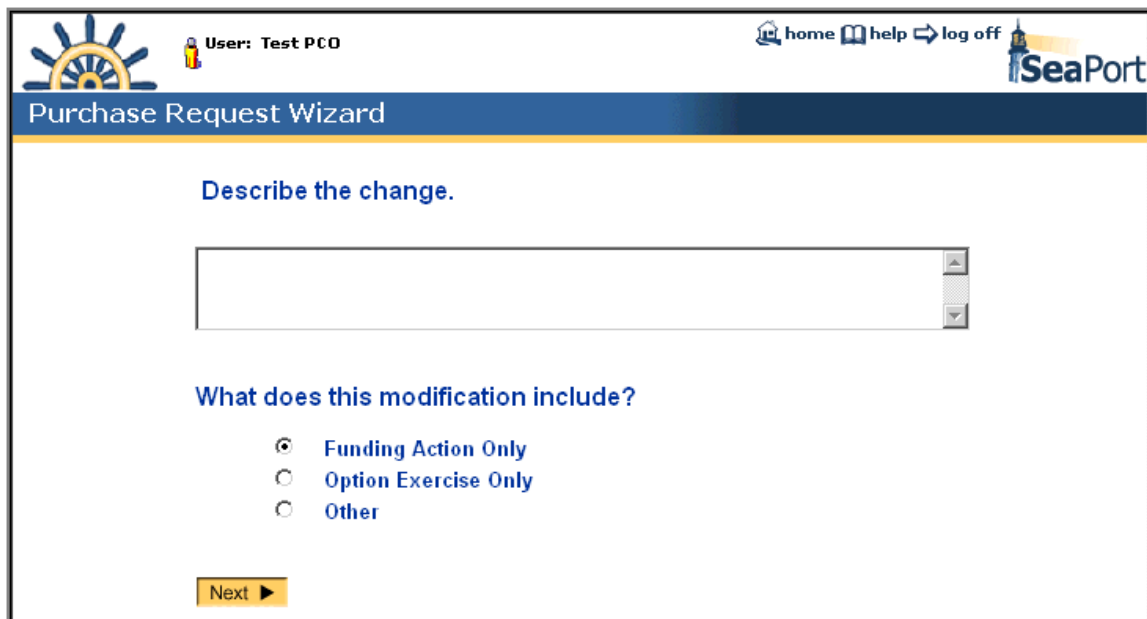
Figure 182: TO Modification – TO Modification Wizard Screen – Description

The user enters a description of the change in the "Describe the change" text box, selects the appropriate radio button choice, and then presses the "Next" button. The system places the user on the Administrative panel in a draft task order modification document. From this point forward the process is identical to the task order process defined earlier in this document.

5.2.15 Add Task Performance Evaluation data

After executing a task order, the Performance Evaluation (Perf. Eval.) tab becomes available as shown in Figure 183.
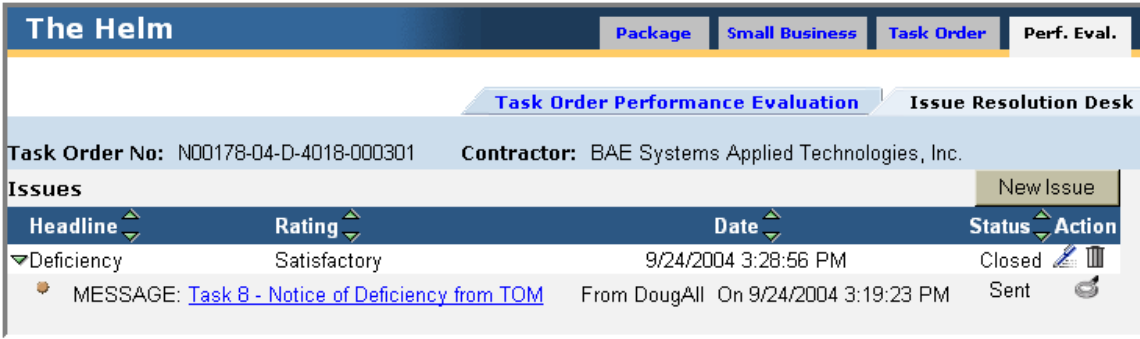
Figure 183: TO – Performance Evaluation Tab

5.2.15.1 Issue Resolution Desk (IRD)

The Issue Resolution Desk (IRD) is a means of communication between the contractor and the TOM. Issues are created from the Issue Resolution Desk tab shown in Figure 184 below, by clicking on the *New Issue* button.

Issues can be edited or deleted. New issues can be added under a new headline or as a follow up to an existing headline.
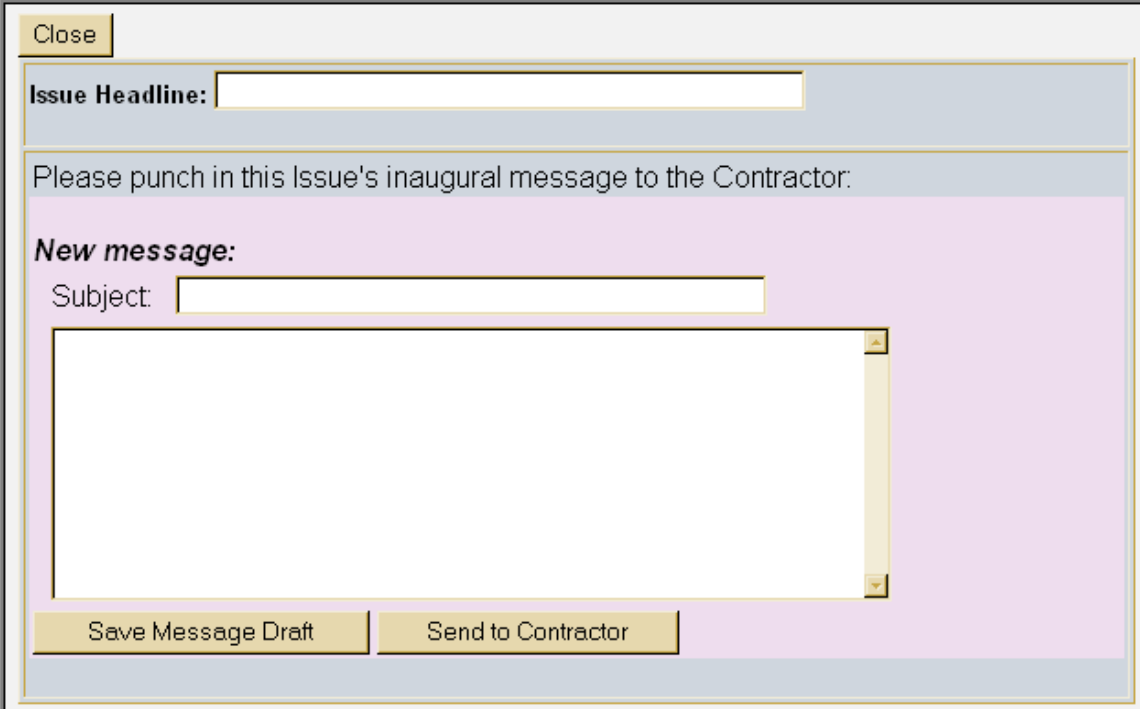
Figure 184: Issue Resolution Desk

This will open the New Issue window shown in Figure 185. Issues created take the form of a threaded discussion between the contractor and the TOM. These are much like an Internet newsgroup.

Figure 185: Issue Resolution Desk – New Issue Window

5.2.15.2 Task Order Performance Evaluation

When the first year of the Period of Performance is coming to an end, the TOM will get a notification to come into the system and perform a TOPE. The notification will contain a red carpet link to the Task Order. The TOM will select the Performance Evaluation tab and click the *New Evaluation* button as shown in Figure 186.

Figure 186: Task Order Performance Evaluation

A new evaluation form will pop up in a new window. This form is shown in Figure 187 below.

Figure 187: TOPE Form

The available responses for all questions are:

- ✎ 5- Superior
- ✎ 4
- ✎ 3
- ✎ 2
- ✎ 1 - Unsatisfactory

In addition to the available responses, there is a text box to enter any additional Comments.

The complete list of questions is:

- Was the Contractor cooperative and capable?

- Were services and/or deliverables provided in a timely manner IAW the terms of the Task Order?

- How would you rate the quality of the services and/or deliverables received?

- How would you rate the overall performance of the contractor?

- If you had another requirement for these services and/or deliverables, would you hire this contractor again?

- How would you rate the performance of the contractor from cost perspective?

- Please provide any additional comments or information that may help to determine the contractor's performance on future Task Order: (comments only)
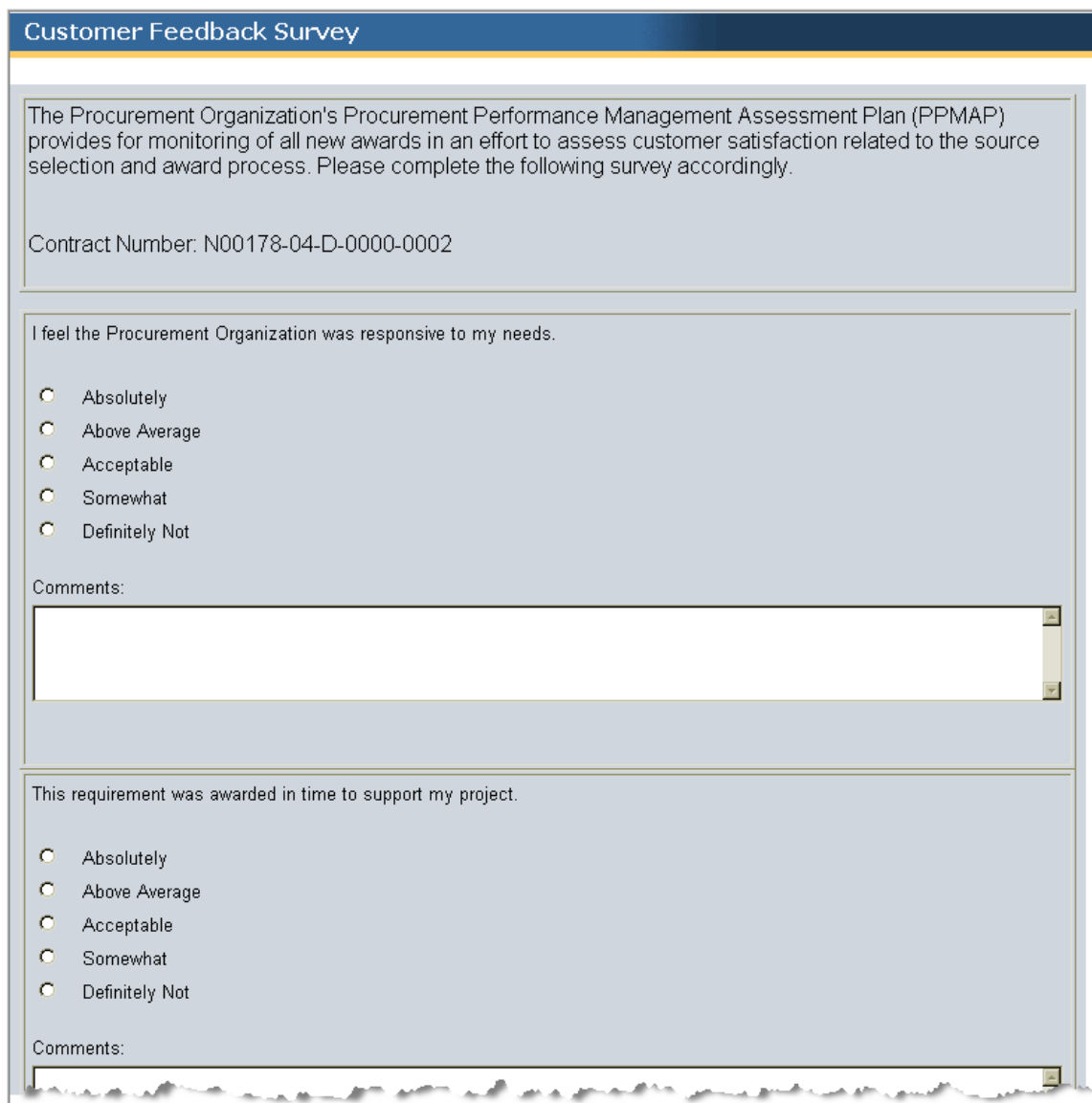
After completing the TOPE form, the TOM submits it to the contractor. The contractor has 30 days to respond. After 30 days – or as soon as the vendor response is received – the TOM can either lock the TOPE or revise it and re-submit it to the contractor. The contractor will have 30 days to respond to a revised TOPE. If the TOM locks the TOPE, it is read-only and no one else can revise it. The TOPE can be revised as many times as needed until it is locked. SeaPort will send a TOPE reminder at the end of each option year until the Task Order is completed.

5.2.16   Customer Satisfaction Survey

When executing a TO, a PCO selects users to send the Customer Satisfaction Survey notifications to. E-mail notifications are sent to the following default users:

- Evaluator
- TOM
- Chairman
- Originator

A PCO can select additional users. Users get an e-mail with a link to the Customer Satisfaction Survey. They can also access it through the Workflow Page. A Customer Satisfaction Survey is shown in Figure 188 below.

Figure 188: Customer Satisfaction Survey

The available responses for all questions are:

- Absolutely
- Above Average
- Acceptable
- Somewhat
- Definitely Not

In addition to the available responses, there is a text box to enter any additional Comments.

The complete list of questions is:

- I feel the Procurement Organization was responsive to my needs.

- This requirement was awarded in time to support my project.

- The contracting personnel worked with me to develop acquisition strategies early in the planning process.

- If there were problems encountered, they were handled in a timely manner and solved effectively.

- The Procurement Organization's Level of Professionalism was:

- My overall experience with the Procurement Organization has been:

- Suggestions on how the Procurement Organization can better serve your needs: (comments only)

6   Reports

This section details the Reports training session. The Reports training session follows the structure outlined in the *SeaPort II Training Plan*, Section 3.1: Training Methodology, and contains the key concepts outlined in Section 5: Training Curriculum.

6.1   Reports Overview

SeaPort includes report-generation functionality and a small set of standard reports.

SeaPort administrators can develop custom site-specific reports. These can then be added to the SeaPort Reports menu page. See your SeaPort administrator for more information.

Currently SeaPort includes the following reports.

- Advanced Planning Report
- Customer Survey Report
- Customer Survey Scoring Summary Report
- Executed Task Orders Report
- Issue Resolution Desk (IRD) Report
- Option Expiration Report
- Package Status Report
- Procurement Summary Report
- Q & A Status Report
- Small Business Report
- Small Business Subcontracting Report
- Solicitation Report
- Master Task Order Report
- Task Order Award Report
- Task Order Cumulative Status Report
- Task Order Report
- TimeStamp Report
- TimeStamp Per Package Report
- TO Cost Reduction Report
- TOPE Report
- TOPE Scoring Summary Report
- TOPE Status Report
- Workload Report

NOTE: Not all users will have access to the same reports.

Do the following to select a report:

1. On the SeaPort home page, select Reports from the header navigation.

2. Click on the report title. This is a hyperlink that loads the selected report setup.

3. Some reports require further information. For example, you may need to select from a list of contractors, procurement types, or negotiators.

4. After selecting the appropriate parameters, click Submit.

5. SeaPort creates the report and displays it in a separate window.

> **NOTE:** If the report is a standard report, it will be displayed using the Adobe Acrobat Reader. If it is a custom report developed with some other reporting tool, (e.g., Crystal Reports), it will be displayed using the appropriate viewer (e.g., Crystal Reports' viewer).

> **NOTE:** If the report you are running is a custom Crystal Reports report, you may save an electronic copy of the report by selecting the *Export Report* button and selecting an export format.

Figure 189: Reports – Reports List
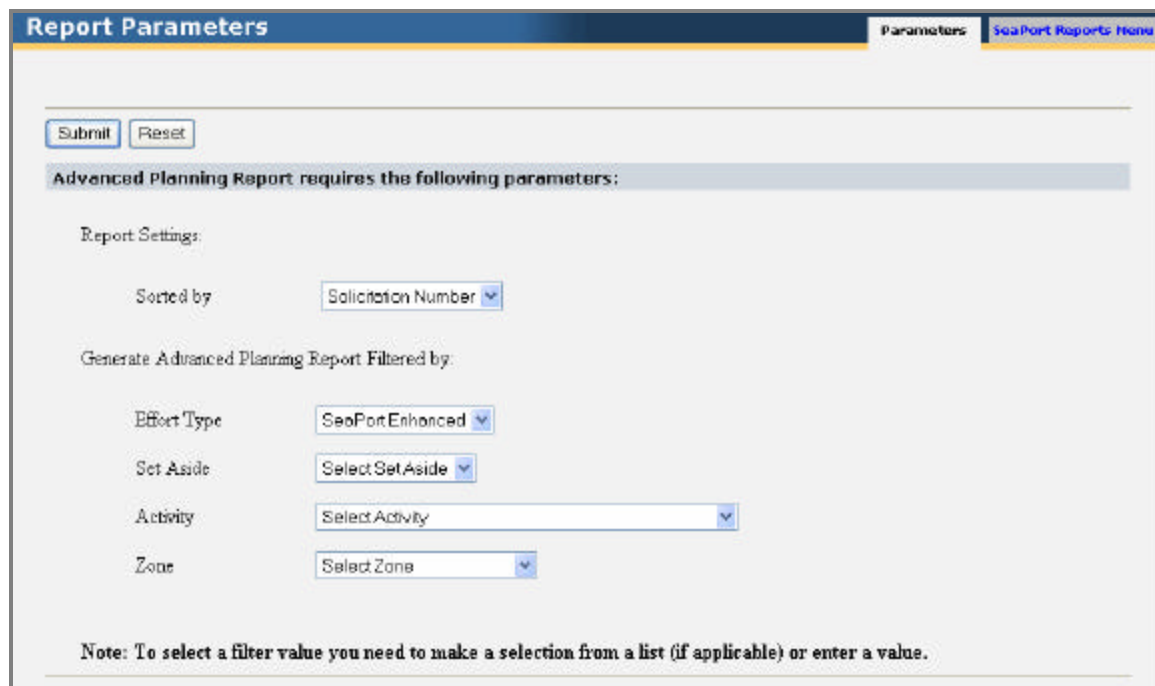
6.2 Advanced Planning Report

The Advanced Planning Report displays estimated target dates for various milestones in the acquisition lifecycle for selected procurement packages. The SeaPort Advanced Planning Report will be available to the 1102 and PCO users from the Seaport menu. Enter your report criteria to change the results that are reported.

Note that a solicitation's advanced planning data must be released by the PCO in order for it to be included in the Advanced Planning Report.

Table 86: Advanced Planning Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by Solicitation Number, Activity, Set Aside, or Zone via the dropdown list.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Set Aside	Dropdown	Select Full Set Aside, Cascade, or No. The report will be limited to the Set Aside type selected. This parameter is only visible for Seaport-e efforts.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list. This parameter is only visible for Seaport-e efforts.
Zone	Dropdown	Limit the report results to the Zone chosen from the dropdown list. This parameter is only visible for Seaport-e efforts.

Figure 190: Reports – Advanced Planning Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window.

Figure 191: Reports – Advanced Planning Report

6.3   Customer Survey Report

The Customer Survey Report displays completed customer feedback surveys and a tabulated survey average. The SeaPort Customer Survey Report will be available to the 1102 and PCO users from the Seaport menu. Enter your report criteria to change the results that are reported.

Table 87: Customer Survey Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
TO Number	Dropdown	Limit the search results to the Task Order Number chosen from the dropdown list.
Dated Between	Text Box	Enter To and From dates to define the report period.
PCO	Dropdown	Limit the search results to the PCO chosen from the dropdown list.

Figure 192: Reports – Customer Survey Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 193: Reports – Customer Survey Report

6.4   Customer Survey Scoring Summary Report

The Customer Survey Scoring Summary Report displays scores for Task Orders and an Average Score. Enter your report criteria to change the results that are reported.

Table 88: Customer Survey Scoring Summary Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Dated Between	Text Box	Enter To and From dates to define the report period.

Field	Type	Data
TO Number	Dropdown	Limit the search results to the TO Number chosen from the dropdown list.
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.

Figure 194: Reports – Customer Survey Scoring Summary Report – Parameters

Naval Sea System Command
SeaPort Office
Report was created on: 1/28/2005 10:38:56AM

Customer Survey Scoring Summary Report

Report filter(s): None

Task Order Number	Question 1	Question 2	Question 3	Question 4	Question 5	Question 6	Average Score
N00024-01-D-7013-0023	5.00	5.00	5.00	5.00	5.00	5.00	5.00
N00024-01-D-7014-0008	5.00	4.33	4.33	4.00	4.00	3.67	4.22
N00024-01-D-7016-0011	5.00	5.00	5.00	5.00	5.00	5.00	5.00
N00024-01-D-7017-0024	4.50	3.50	4.50	4.00	4.50	4.00	4.17
N00024-01-D-7022-0006	3.50	4.00	5.00	5.00	5.00	3.50	4.33
N00178-04-D-4012-0002	4.50	5.00	4.00	4.50	4.50	4.50	4.50
N00178-04-D-4018-0006	5.00	3.33	2.67	4.33	4.00	4.67	4.00
N00178-04-D-4018-0009	5.00	4.00	4.00	3.00	3.00	3.00	3.67
N00178-04-D-4018-0010	4.67	4.00	3.67	4.67	3.67	4.67	4.22
N00178-04-D-4018-0011	5.00	4.00	3.00	1.00	5.00	2.00	3.33
N00178-04-D-4018-0012	5.00	4.00	4.33	3.67	3.67	3.67	4.06
N00178-04-D-4018-0013	5.00	5.00	3.50	4.00	4.00	4.00	4.25
N00178-04-D-4018-0014	5.00	5.00	3.00	2.00	3.00	3.00	3.50
N00178-04-D-4028-0002	3.67	3.00	3.33	2.67	2.67	3.33	3.11
N00178-04-D-4030-0002	4.67	4.00	4.33	4.33	4.33	4.33	4.33
N00178-04-D-4030-0003	5.00	4.33	4.33	4.67	3.33	5.00	4.44
N00178-04-D-4030-0005	5.00	4.33	3.00	3.33	3.67	3.33	3.78
N00178-04-D-4030-0006	5.00	4.00	3.00	2.50	3.00	4.00	3.58
N00178-04-D-4030-0007	3.33	3.67	4.00	3.00	67	3.67	3.56

Figure 195: Reports – Customer Survey Scoring Summary Report

6.5   Executed Task Orders Report

The Executed Task Orders Report displays Task Orders and Modifications that were executed during a specific time period. Enter your report criteria to change the results that are reported.

Table 89: Executed Task Orders Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by TO Number.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.

Field	Type	Data
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Dated Between	Text Box	Enter To and From dates to define the report period.

Figure 196: Reports – Executed Task Orders Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 197: Reports – Executed Task Orders Report

6.6   Issue Resolution Desk (IRD) Report

The Issue Resolution Desk (IRD) Report displays all issues logged in the system. Enter your report criteria to change the results that are reported.

Table 90: Issue Resolution Desk (IRD) Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.

Field	Type	Data
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
TO Number	Dropdown	Limit the search results to the TO Number chosen from the dropdown list.
Dated Between	Text Box	Enter To and From dates to define the report period.

Figure 198: Reports – Issue Resolution Desk (IRD) Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 199: Reports – Issue Resolution Desk (IRD) Report

6.7   Option Expiration Report

The Option Expiration Report is used by the PCO to get an idea of options that are coming up on expiration. This assists the PCO in gauging workload. Enter your report criteria to change the results that are reported.

Table 91: Option Expiration Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Option SLINs that expire within	Text Box	Enter a number of business days in the text box in order to refine your search.

Figure 200: Reports – Option Expiration Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).
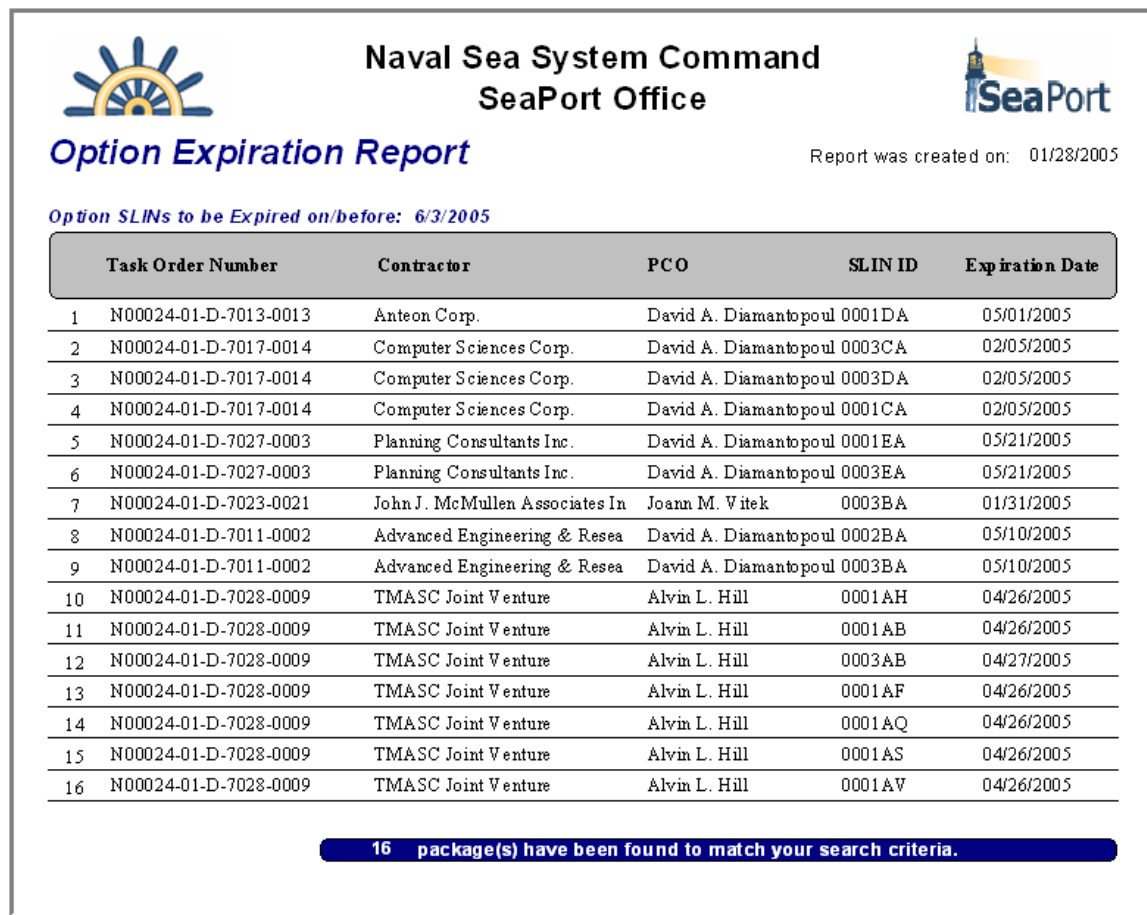
Figure 201: Reports – Option Expiration Report

6.8   Package Status Report

The Package Status Report is a top-level management report about SeaPort activity at the roll-up level. It displays information about all procurement packages and their state. Enter your report criteria to change the results that are reported. Practice PRs are excluded from the report.

Table 92: Package Status Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Select a Contractor from the list. The report will be limited to the Contractor selected.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.

Field	Type	Data
Dated Between	Dates	The report will show procurement documents processed within this date range.
Value is more than/less than	Text Box	The report will show procurement documents with a value in this range.
Length is more than/less than	Text Box	The report will show procurement documents with a duration within this range.

Figure 202: Reports – Package Status Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).
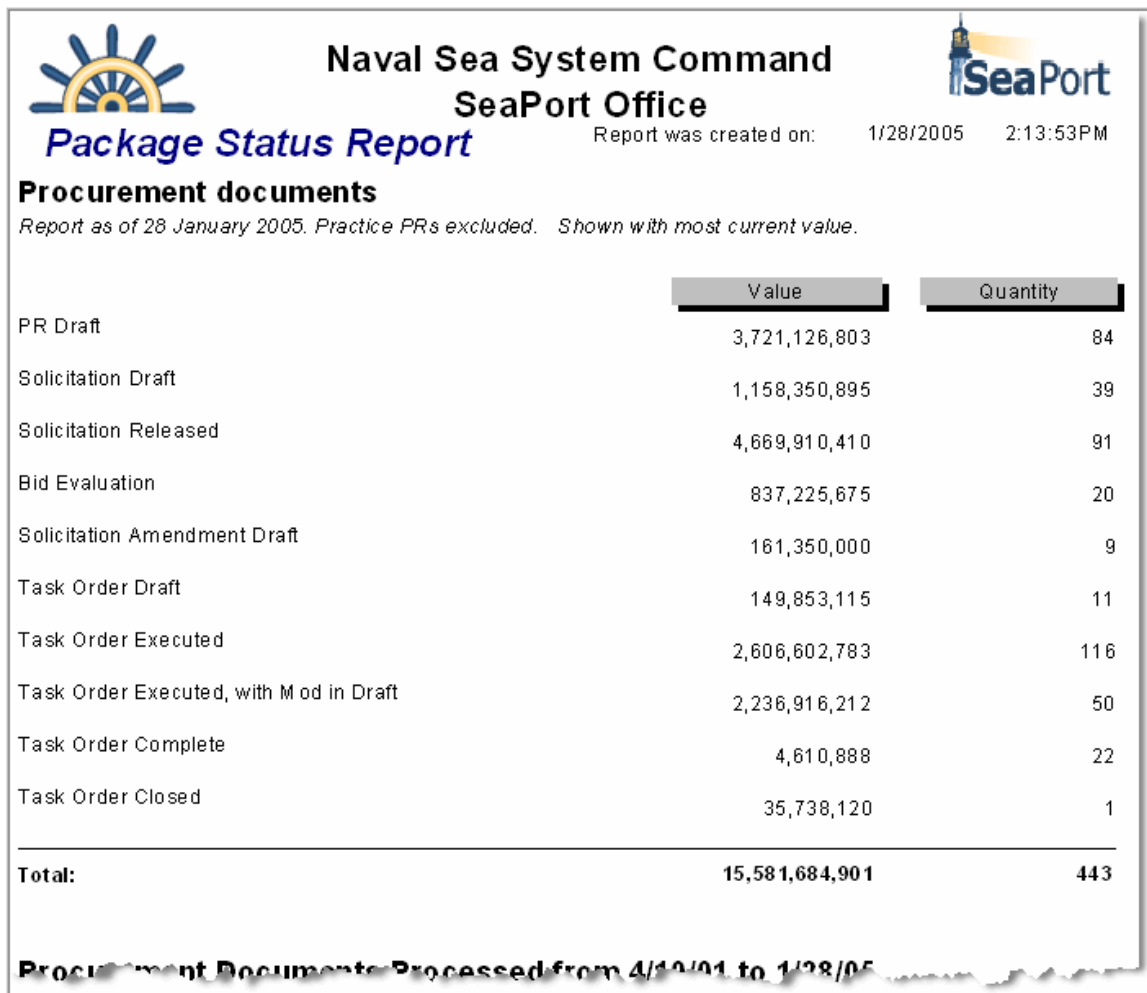
Figure 203: Reports – Package Status Report

6.9   Procurement Summary Report

The Procurement Summary Report displays a summary of all procurement documents organized by procurement cycle state. Enter your report criteria to change the results that are reported.

Table 93: Procurement Summary Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Only display awarded task orders with the selected contractor. Choose a contractor from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.

Field	Type	Data
Directorate	Dropdown	Limit the search results to the Activity/Directorate chosen from the dropdown list.
Customer	Dropdown	Limit the search results to the Customer chosen from the dropdown list.

Figure 204: Reports – Procurement Summary Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).
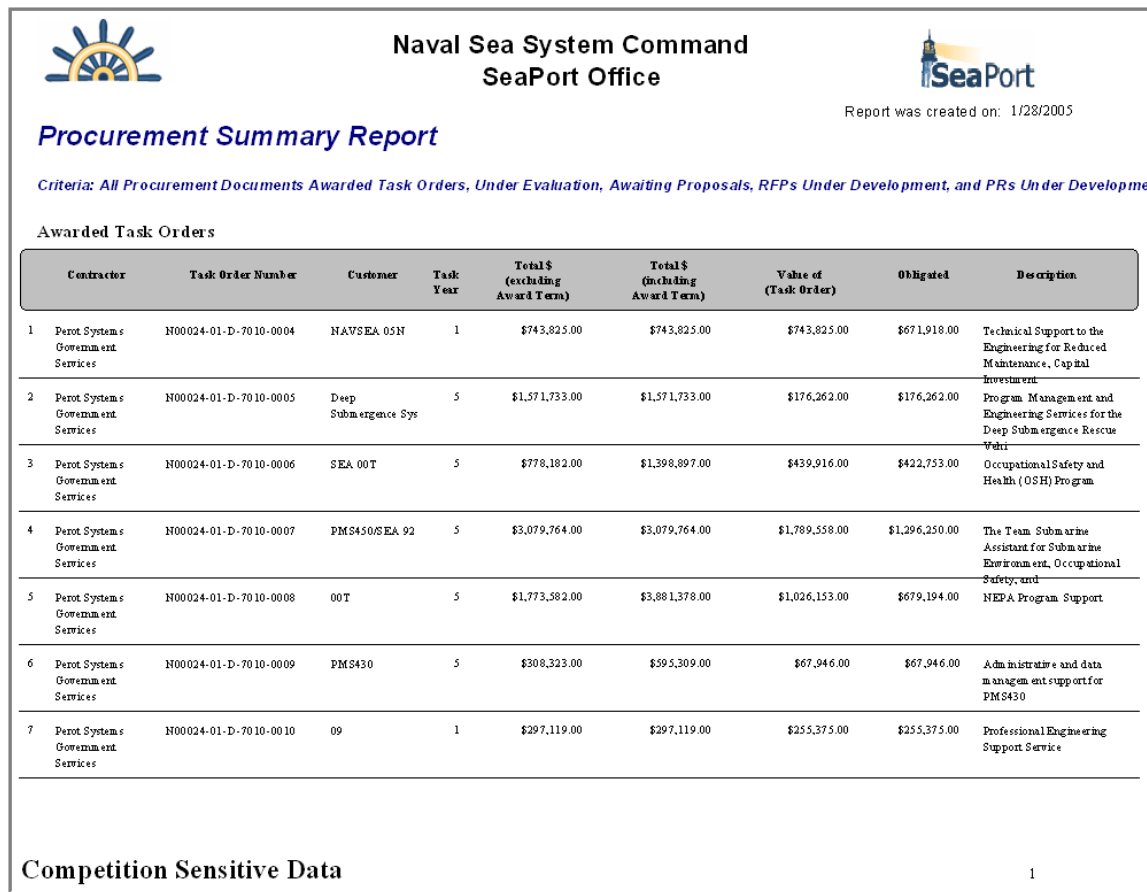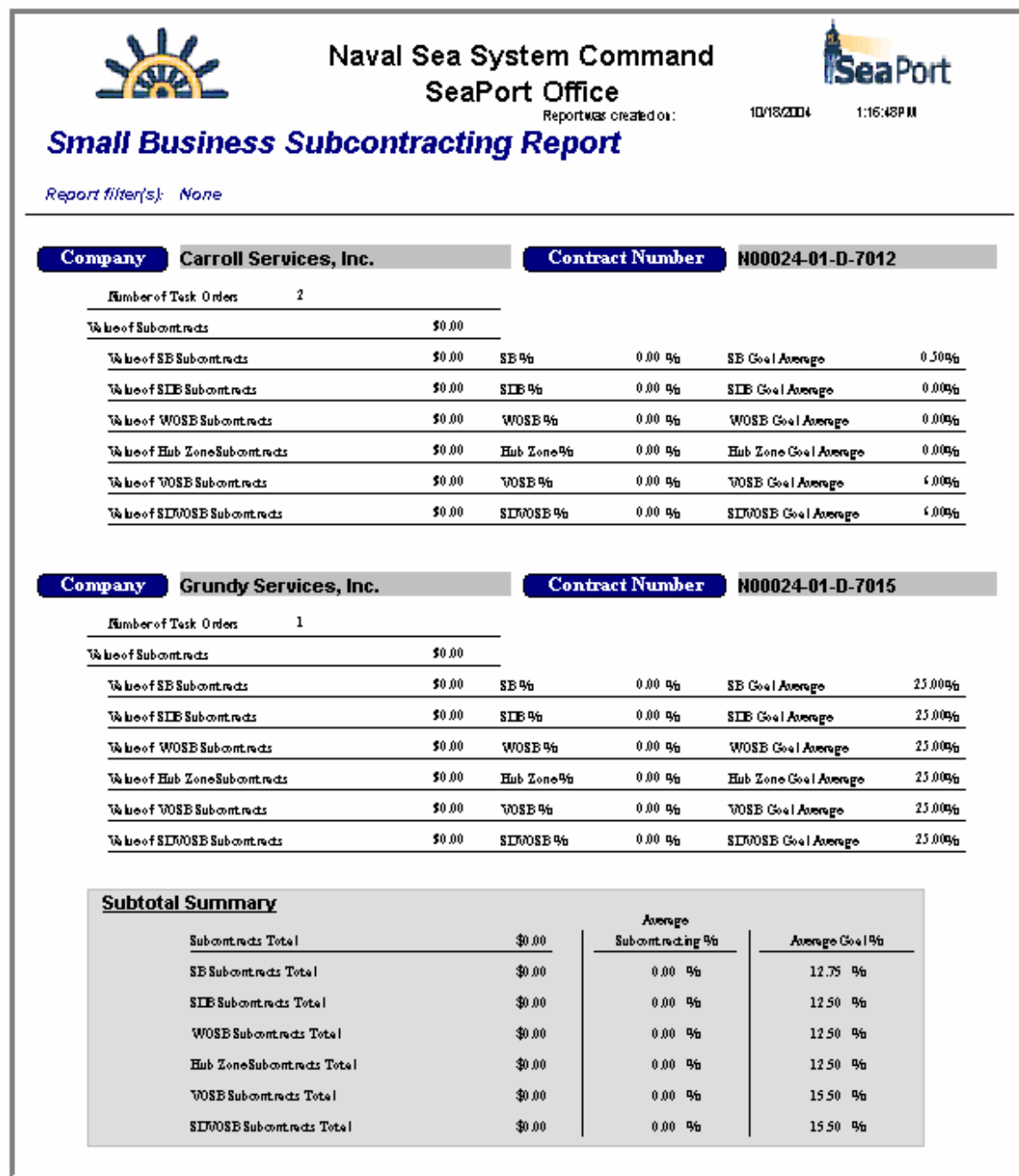
Figure 205: Reports – Procurement Summary Report

6.10   Q & A Status Report

The Q & A Status Report displays scores for Task Orders and an Average Score. Enter your report criteria to change the results that are reported.

Table 94: Q & A Status Report Parameters

Field	Type	Data
Package Number	Dropdown	Limit the report results to the Package Number chosen from the dropdown list. To see results for all packages, do not select a Package Number.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Zone	Dropdown	Limit the report results to the Zone chosen from the dropdown list.

Field	Type	Data
Set Aside	Dropdown	Select Full Set Aside, Cascade, or No. The report will be limited to the Set Aside type selected.

Figure 206: Reports – Q & A Status Report – Parameters
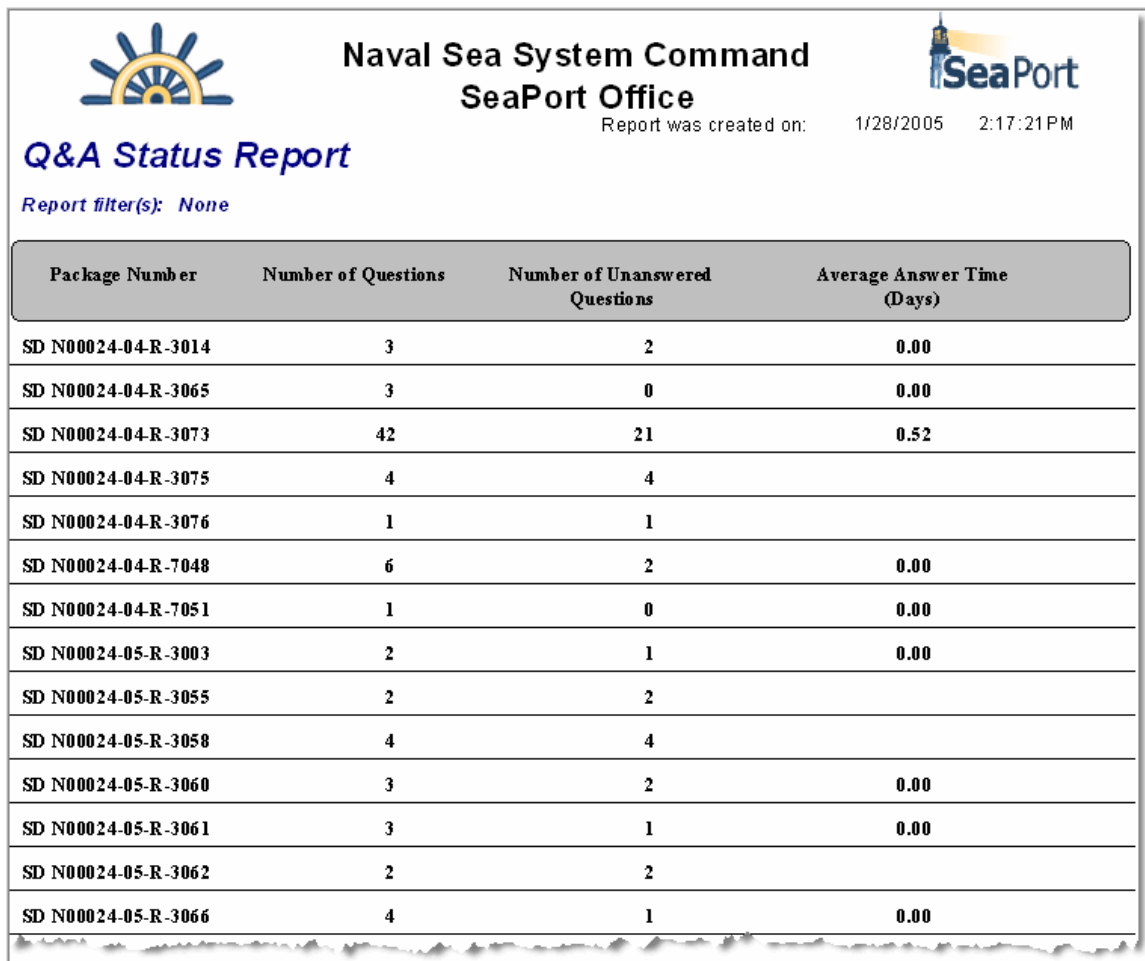
Figure 207: Reports – Q & A Status Report

6.11   Small Business Report

The Small Business Report displays completed award amounts and percentages for large and small businesses. The Seaport Small Business Report will be available to the 1102 and PCO users from the Seaport menu. Enter your report criteria to change the results that are reported.

Table 95: Small Business Report Parameters

Field	Type	Data
Sorted By	Dropdown	Choose Contractor, Contract Number, Number of Task Orders Awarded, Potential Value (Excluding Award Term), Potential Value (Including Award Term), Current TO Awarded Value, or Total Obligations to Date from the dropdown list.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.

Field	Type	Data
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Potential Value (Excluding Award Term)	Text Box	Enter a minimum and/or maximum value to further refine the search results.
Potential Value (Including Award Term)	Text Box	Enter a minimum and/or maximum value to further refine the search results.
Current TO Awarded Value	Text Box	Enter a minimum and/or maximum value to further refine the search results.
Total Obligations	Text Box	Enter a minimum and/or maximum value to further refine the search results.

Figure 208: Reports – Small Business Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Naval Sea System Command
SeaPort Office
SeaPort

Report was created on: 1/28/2005   2:22:47PM

Small Business Report

Report filter(s): None

Company	Contract Number	Number of Task Orders	Total Value (excluding Award Term)	Total Value (including Award Term)	Current Value of Task Orders Awarded	Total Obligations to Date
Large Businesses						
Anteon Corp.	N00024-01-D-7013	15	$332,380,180	$643,759,514	$108,102,585	$64,573,196
BAE Systems	N00024-01-D-7014	10	$267,364,044	$430,073,315	$72,137,535	$56,766,097
CACI Technologies Inc.	N00024-01-D-7015	2	$2,179,562	$3,989,104	$695,536	$660,784
Computer Sciences Corp.	N00024-01-D-7017	23	$538,553,143	$892,573,846	$136,303,031	$130,896,062
EG&G Technical Services Inc.	N00024-01-D-7019	7	$544,267,693	$552,690,832	$135,749,786	$115,097,410
AT&T Government Solutions, Inc.	N00024-01-D-7021	4	$29,599,406	$44,369,421	$11,245,494	$10,646,921
John J. McMullen Associates Inc.	N00024-01-D-7023	20	$254,133,989	$400,887,844	$56,759,695	$53,320,924
Lockheed Martin Integrated System	N00024-01-D-7025	2	$13,276,188	$22,614,993	$5,478,583	$5,478,583
Northrop Grumman Info Tech Defe	N00024-01-D-7026	6	$64,313,150	$111,463,502	$27,121,796	$25,957,193
Planning Consultants Inc.	N00024-01-D-7027	4	$30,881,290	$57,616,188	$3,817,318	$2,851,000
TMASC Joint Venture	N00024-01-D-7028	10	$167,928,087	$287,744,200	$30,559,097	$29,959,146
Vredenburg	N00024-01-D-7030	6	$88,752,222	$162,022,707	$24,711,534	$23,841,668
BAE Systems Applied Technologie	N00178-04-D-4018	16	$84,620,554	$95,890,553	$55,355,114	$11,754,309
New Jersey Associates	N00024-05-D-3333	1	$35,738,120	$35,738,120	$35,738,120	$11,900,000
Hasbro	N00178-05-D-3330	1	$53,620,500	$53,620,500	$30,122,450	$1,400,000
Large Businesses Subtotal:		**127**	**$2,507,608,128**	**$3,795,054,639**	**$733,897,674**	**$545,103,293**

Figure 209: Reports – Small Business Report

6.12   Small Business Subcontracting Report

The Small Business Subcontracting Report displays scores for Task Orders and an Average Score. Enter your report criteria to change the results that are reported.

Table 96: Small Business Subcontracting Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by Contractor, Contract Number, Number of Task Orders Awarded, or Value of Subcontracts.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.

Field	Type	Data
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Value of Subcontracts	Text Box	Enter a minimum and/or maximum value to further refine the search results.
Value of SB Subcontracts	Text Box	Enter a minimum and/or maximum Small Business Subcontracts value to further refine the search results.
Value of SDB Subcontracts	Text Box	Enter a minimum and/or maximum Small Disadvantaged Business Subcontracts value to further refine the search results.
Value of WOSB Subcontracts	Text Box	Enter a minimum and/or maximum Woman-Owned Small Business Subcontracts value to further refine the search results.
Value of Hub Zone Subcontracts	Text Box	Enter a minimum and/or maximum Hub Zone Subcontracts value to further refine the search results.
Value of VOSB Subcontracts	Text Box	Enter a minimum and/or maximum Veteran-Owned Small Business Subcontracts value to further refine the search results.
Value of SDVOSB Subcontracts	Text Box	Enter a minimum and/or maximum Service-Disabled Veteran-Owned Small Business Subcontracts value to further refine the search results.

Figure 210: Reports – Small Business Subcontracting Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 211: Reports – Small Business Subcontracting Report

6.13   Solicitation Report

The Solicitation Report displays summary-level detail of procurement packages in Solicitation phase. Enter your report criteria to change the results that are reported.

Table 97: Solicitation Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by Solicitation Number, Activity, Set Aside, or Zone via the dropdown list.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Set Aside	Dropdown	Select Full Set Aside, Cascade, or No. The report will be limited to the Set Aside type selected. This parameter is only visible for Seaport-e efforts.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list. This parameter is only visible for Seaport-e efforts.
Zone	Dropdown	Limit the report results to the Zone chosen from the dropdown list. This parameter is only visible for Seaport-e efforts.

Figure 212: Reports – Solicitation Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 213: Reports – Solicitation Report

6.14 Master Task Order Report

The Master Task Order Report displays all Task Orders within the system. This report is available only to those with a Super-user role. The Master Task Order Report does not provide the ability to enter report criteria. The report is executed upon choosing it from the

SeaPort Reports menu. The results are displayed in a separate pop-up window in HTML format.

Figure 214: Reports – Master Task Order Report

6.15   Task Order Award Report

The Task Order Award Report displays scores for Task Orders and an Average Score. Enter your report criteria to change the results that are reported.

Table 98: Task Order Award Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by Award Date, TO Number, or Total Potential Value.
Report View	Dropdown	Select either Government User or Vendor from the dropdown list.
Effort Type	Dropdown	Limit the report results to the Effort Type chosen from the dropdown list.
Customer	Dropdown	Limit the report results to the Customer chosen from the dropdown list.
Awardee	Dropdown	Limit the report results to the Awardee chosen from the dropdown list.

Figure 215: Reports – Task Order Award Report – Parameters

Figure 216: Reports – Task Order Award Report

6.16   Task Order Cumulative Status Report

The Task Order Cumulative Status Report displays summary-level data for various Task Orders. Enter your report criteria to change the results that are reported.

Table 99: Task Order Cumulative Status Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by TO Number, Effort Type, Contractor, Set Aside, or Zone via the dropdown list.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Select a Contractor.

Field	Type	Data
Set Aside	Dropdown	Select Full Set Aside, Cascade, or No. The report will be limited to the Set Aside type selected. This parameter is only visible for Seaport-e efforts.
Zone	Dropdown	Limit the report results to the Zone chosen from the dropdown list. This parameter is only visible for Seaport-e efforts.

Figure 217: Reports – Task Order Cumulative Status Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window.

Figure 218: Reports – Task Order Cumulative Status Report

6.17   Task Order Report

The Task Order Report displays detailed potential and obligated value and execution dates for various Task Orders. Enter your report criteria to change the results that are reported.

Table 100: Task Order Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by Contractor, Color of Money, or CLIN.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Awarded To	Dropdown	Only display task orders with the selected contractor. Choose a contractor from the dropdown list.
Activity	Dropdown	Select an Activity from the list. The report will be limited to the Activity selected.
Value - More Than	Text Box	Only display task orders where the value is more than the number entered here.
Value - Less Than	Text Box	Only display task orders where the value is less than the number entered here.
Dated Between	Text Box	Only display task orders where the date executed is within the date range entered here. Enter the dates directly using the MM/DD/YYYY format or use the calendar icons to choose a date.
Business Ownership	Dropdown	Only display task orders the selected Business Ownership type. Choose from 8A, HUB, SB, VET, or WO.
Status	Dropdown	Only display task orders with the selected Status. Choose Ongoing, Complete, or Closed.
Directorate	Dropdown	Only display task orders with the selected directorate. Choose a Directorate from the list.
Procurement Type	Dropdown	Only display task orders with the selected Procurement Type. Choose Competitive or Sole Source.
Selection Criteria	Dropdown	Only display task orders with the selected Selection Criteria. Choose a Best Value or Low Cost Tech Acceptable.
SOW Contains Word(s)	Text Box	Only display task orders where the SOW contains the text entered here.
Funding Type	Dropdown	Only display task orders with the selected Funding Type.
CLIN Type(s)	Check Box	Only display task orders containing Cost Type CLINS.
	Check Box	Only display task orders containing FFP CLINS.
	Check Box	Only display task orders containing Cost Only CLINS.

Figure 219: Reports – Task Order Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).
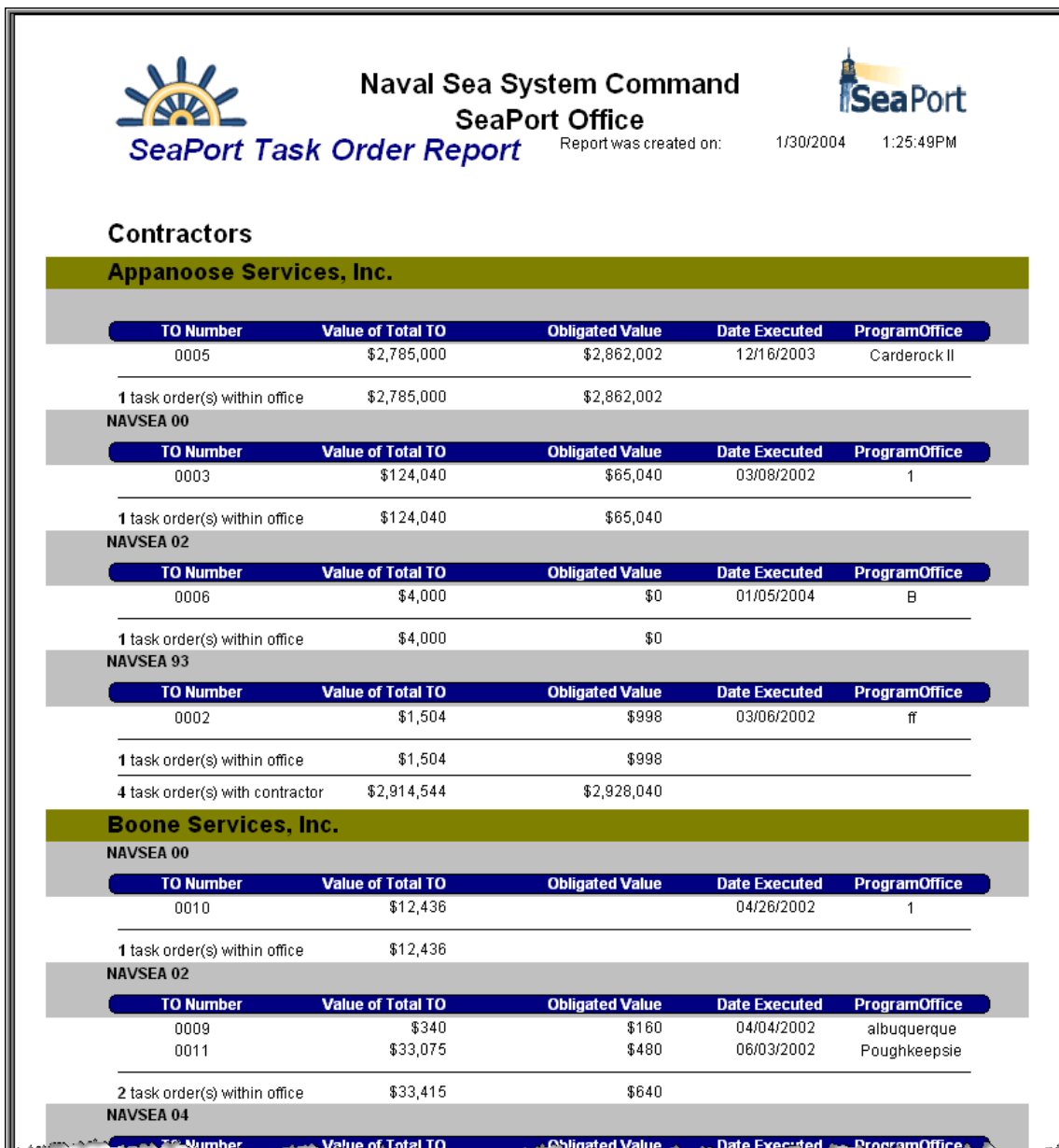
Figure 220: Reports – Task Order Report

6.18   TimeStamp Report

The TimeStamp Report displays the amount of time each package takes to go from Purchase Request to Executed Task Order and the amount of time each package spends in each particular state. Enter your report criteria to change the results that are reported.

Table 101: TimeStamp Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by Activity or Program Office.
Between Starting Event and Ending Event	Dropdown	Display packages between the selected starting event and ending event. Choose from PR Creation, SD Creation, SD Lock & Release, Bid Event Close, Task Order Creation, or Task Order Executed. Default action for the report is to display packages from PR Creation to Task Order Execution.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Only display packages with the selected contractor. Choose a contractor from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Negotiator	Dropdown	Limit the report results to the Negotiator chosen from the dropdown list.
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.
Dated Between	Text Box	Limit the report results to the selected date range. Type dates in directly using the MM/DD/YYYY format or use the calendar icons to select dates.
Funding Type	Dropdown	Limit the report results to the Funding Type chosen from the dropdown list.

Figure 221: Reports – TimeStamp Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 222: Reports – TimeStamp Report

6.19   TimeStamp Per Package Report

The TimeStamp Per Package Report displays Package Number, PR Development Time, RFP Development Time, Proposal Development Time, Proposal Evaluation Time, Award Time, and Total Potential Value. This report may be sorted by any of these values. Enter your report criteria to change the results that are reported.

Table 102: TimeStamp Per Package Report Parameters

Field	Type	Data
Sorted By	Dropdown	Choose Package Number, PR Development Time, RFP Development Time, Proposal Development Time, Proposal Evaluation Time, Award Time, or Total Potential Value from the dropdown list.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.

Field	Type	Data
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Package Number	Dropdown	Limit the report results to the Package Number chosen from the dropdown list.
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.

Figure 223: Reports – TimeStamp Per Package Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 224: Reports – TimeStamp Per Package Report
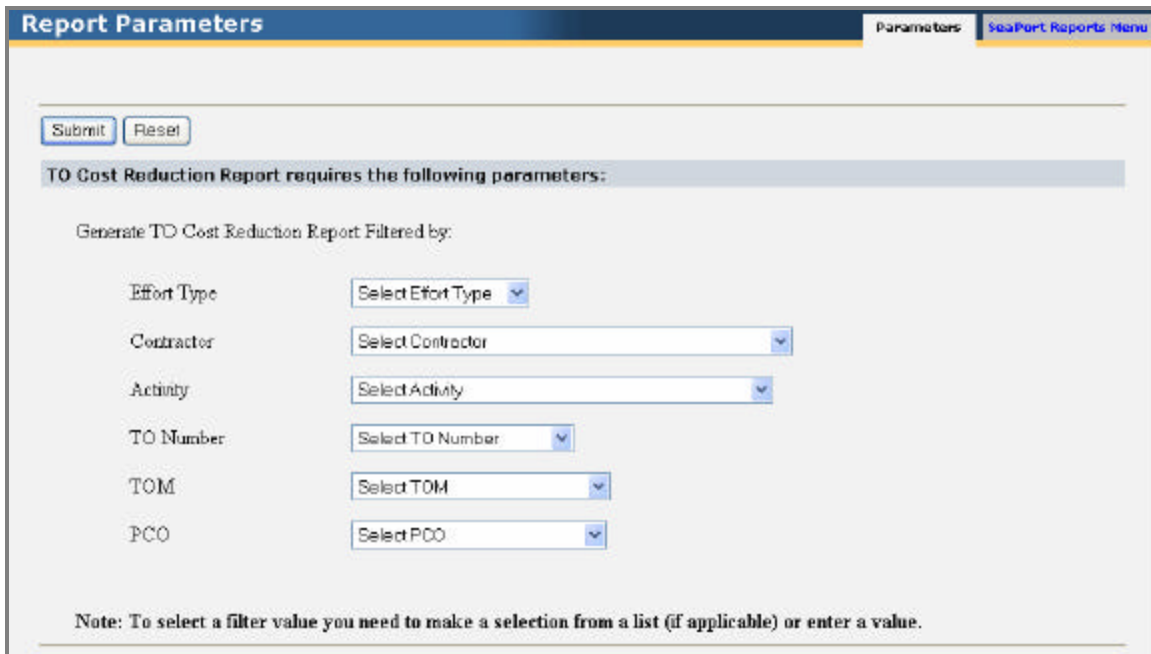
6.20   TO Cost Reduction Report

The TO Cost Reduction Report displays a summary of Task Order Performance Evaluation data meeting criteria for a particular Task Order. The report contains information on locked Task Orders and executed Task Orders that have been running for at least a year or are at the end of their period of performance. Enter your report criteria to change the results that are reported.

Table 103: TO Cost Reduction Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.

Field	Type	Data
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
TO Number	Dropdown	Limit the search results to the TO Number chosen from the dropdown list.
TOM	Dropdown	Select a Task Order Manager
PCO	Dropdown	Select a PCO

Figure 225: Reports – TO Cost Reduction Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 226: Reports – TO Cost Reduction Report

6.21 TOPE Report

The TOPE Report displays a summary of Task Order Performance Evaluation data meeting criteria for a particular Task Order. The report contains information on locked Task Orders and executed Task Orders that have been running for at least a year or are at the end of their period of performance. Enter your report criteria to change the results that are reported.

Table 104: TOPE Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.

Field	Type	Data
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
TO Number	Dropdown	Limit the search results to the TO Number chosen from the dropdown list.
Date Range Between	Text Box	Enter To and From dates to define the report period.

Figure 227: Reports – TOPE Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 228: Reports – TOPE Report

6.22   TOPE Scoring Summary Report

The TOPE Scoring Summary Report provides more detailed information on each Performance Evaluation and a link to view the actual evaluation. Enter your report criteria to change the results that are reported.

Table 105: TOPE Scoring Summary Report Parameters

Field	Type	Data
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
TO Number	Dropdown	Limit the report results to the Task Order Number chosen from the dropdown list.
Date Range	Text Box	Enter To and From dates to define the report period.

Figure 229: Reports – TOPE Scoring Summary Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate browser window.

Figure 230: Reports – TOPE Scoring Summary Report

6.23   TOPE Status Report

The TOPE Status Report displays detailed TOPE status information including TOPE number, status, and date. Enter your report criteria to change the results that are reported.

Table 106: TOPE Status Report Parameters

Field	Type	Data
Sorted By	Dropdown	Choose Task Order Number, TOPE Status, or PCO from the dropdown list.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Executed TO Number	Dropdown	Limit the report results to the Task Order Number chosen from the dropdown list.
TOM	Dropdown	Limit the report results to the Task Order Manager chosen from the dropdown list.

Field	Type	Data
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.

Figure 231: Reports – TOPE Status Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Figure 232: Reports – TOPE Status Report

6.24   Workload Report

The Workload Report displays TO Number, Customer, Task Years, Total &, and PCO. Enter your report criteria to change the results that are reported.

Table 107: Workload Report Parameters

Field	Type	Data
Sorted By	Dropdown	Choose Task Order Number or Current PCO from the list.
Effort Type	Dropdown	Select SeaPort or SeaPort Enhanced. The report will be limited to the Effort Type selected.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.

Field	Type	Data
Directorate	Dropdown	Limit the report results to the Directorate chosen from the dropdown list.
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.

Figure 233: Reports – Workload Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).
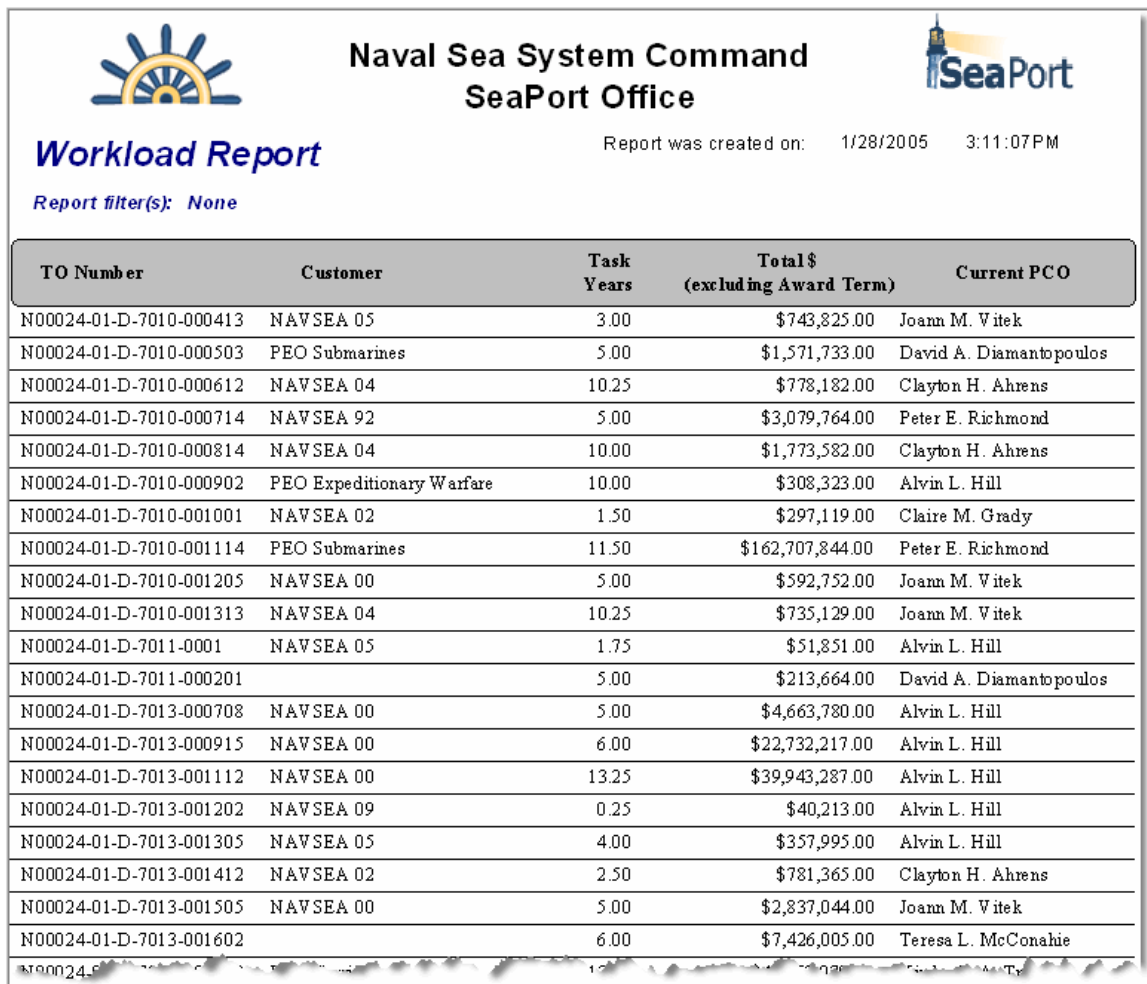
Figure 234: Reports – Workload Report

6.25   User Manager

Select the User Manager link from the list of administrative functions found on the System Admin page. From the User Manager page, the Administrator can deactivate a user or edit the following user information

7   System Administration

This section details the System Administration training session. The System Administration training session follows the structure outlined in the _SeaPort II Training Plan_, Section 3.1: Training Methodology, and contains the key concepts outlined in Section 5: Training Curriculum.

Selecting the System Admin link in the header navigation will bring up the System Administration page shown in Figure 235 below. This page is only accessible by users with a SeaPort System Administrator role. The System Admin page contains a list of links. Select a link to perform an administrative function.
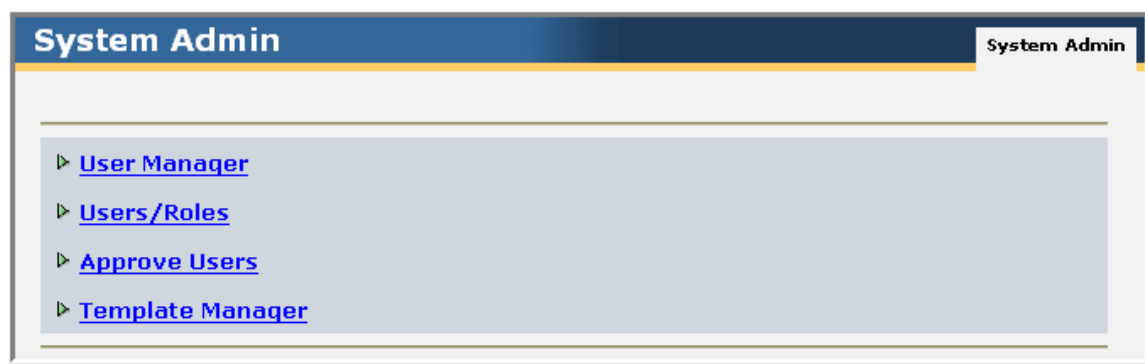
System Admin   System Admin

▷ **User Manager**

▷ **Users/Roles**

▷ **Approve Users**

▷ **Template Manager**

Figure 235: System Admin

7.1   User Manager

Select the User Manager link from the list of administrative functions found on the System Admin page. From the User Manager page, the Administrator can deactivate a user or edit the following user information:

- Name
- System User ID
- Login ID
- Status
- Code
- Activity
- Organization
- E-mail
- Phone

- Extension
- Fax
- Location
- Address
- City
- State
- ZIP
- Time Zone
- Roles

Initially these fields will be blank. Using the _Find User_ button, the Administrator can use the User Search feature to choose the user he wishes to edit or deactivate. After choosing a user, the fields will be populated as shown in Figure 236 below.

A user can be deactivated by selecting the *Deactivate User* button or the user information can be edited by selecting the edit icon ✎. The User Edit page is shown in Figure 237 below.

Figure 236: User Manager – User Information

The User Edit page contains the following buttons:

Table 108: User Edit – Buttons

Button	Description
Find User	This open up the User Search feature where a user can be selected.
Save	Saves all changes to the database. (Also activated by the disk icon 💾.)
Reset Password	Replaces the user's password with a randomly-generated one. The user will receive a notification e-mail that contains the new password. **Note:** If the User Account was locked, resetting the password will automatically unlock it.
Deactivate User	The user will no longer be able to log into SeaPort.

Figure 237: User Manager –User Edit

7.2   Users/Roles

Select the Users/Roles link from the list of administrative functions found on the System Admin page. From the Users/Roles page, the Administrator can select from a list of activities and display a list of *Users per Role* or *Roles per User* for that activity. The Users/Roles page is shown in Figure 238 below.
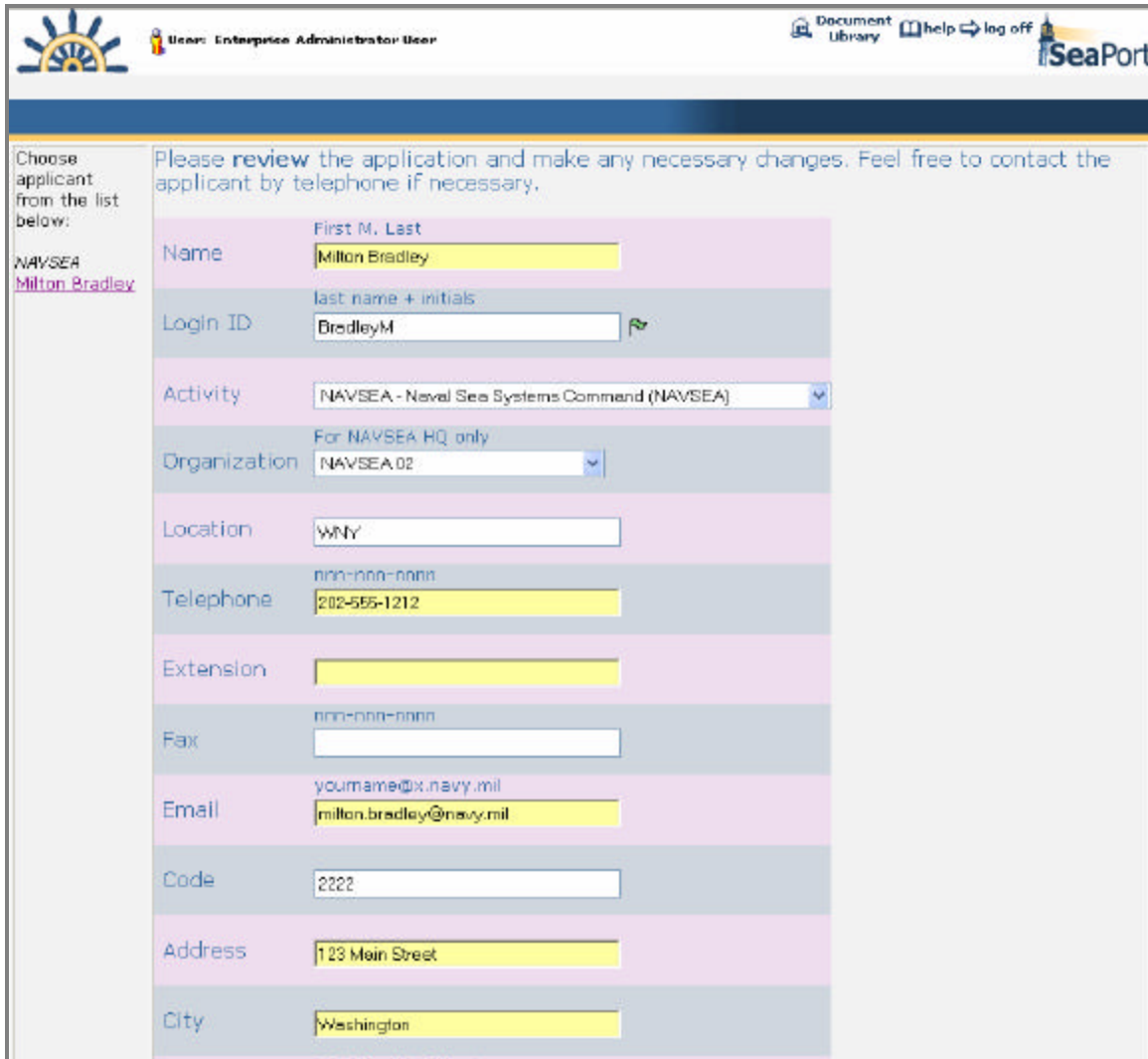
Figure 238: User Roles

7.3   Approve Users

Select the Approve Users link from the list of administrative functions found on the System Admin page. From the Approve Users page, the Administrator can review application information and approve or reject users. The Approve Users page is shown in Figure 239 below.

Figure 239: Approve Users

7.4   Template Manager

Select the Template Manager link from the list of administrative functions found on the System Admin page. Any user with access to the Template Manager may view any template in the system. PCOs and Field Administrators may create, edit, or delete only those templates that are associated with their Activity. A History of template changes is maintained at the bottom of the page. The Template Manager page is shown in Figure 240 below.

The Helm

Template Manager

Choose an Activity: Naval Sea Systems Command (NAVSEA)

Choose a Section: Section E Inspection and Acceptance

Choose a Template: Section E Inspection and Acceptance

Save Template   Delete Template

Template Name: Section E Inspection and Acceptance

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History:

Event	Date	Agent
Template choice updated	8/5/2004	Enterprise Administrator User
Template choice created	8/5/2004	Enterprise Administrator User

Figure 240: Template Manager